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ABSTRACT

The Tourism Standards Consortium (TSC) is a partnership of the governments of Canada's western provinces (Alberta, Manitoba, Saskatchewan, and British Columbia), the provinces' tourism industries, and the Pacific Rim Institute of Tourism in British Columbia. In an effort to increase professionalism in Western Canada's tourism industry, the TSC initiated a process of industry-led development of occupational standards and a challenge model certification process. Two occupations, food and beverage server and local tour guide, were selected to field test the certification process. In 1992, a formative evaluation of the certification process was conducted. The certification process components (written examination, on-the-job performance review, and industry evaluation) were field-tested on 198 candidates (79 have been certified, 34 are still completing the certification process, 15 failed the written examination and did not reregister, 35 dropped out of the process, and 35 others are either waiting for industry evaluation or still need prerequisites). Input on the certification process from candidates, invigilators, supervisors, industry evaluators, and provincial coordinators and certification assistants was obtained through telephone interviews and written questionnaires. The participants, particularly the candidates, were pleased with the certification process and the benefits of becoming certified. (Appended are the eight interview/survey instruments, formative evaluation schedule, survey results from each of the respondent groups, and feedback on the standards.) (MN)

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CERTIFICATION FIELD TEST

TOURISM STANDARDS

WESTERN CANADA

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FINAL REPORT

FORMATIVE EVALUATION

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Alberta Tourism Education Council

TOURISM
STANDARDS
WESTERN
CANADA

CERTIFICATION FIELD TEST

FINAL REPORT

FORMATIVE EVALUATION

Regarding the implementation of a certification process
based on the participants' experiences

October 31, 1993

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HIGHLIGHTS

The Tourism Standards Consortium (TSC) is a partnership between the Tourism Education Councils of Alberta, Manitoba and Saskatchewan, the Pacific Rim Institute of Tourism in British Columbia, the provincial governments of Western Canada, Western Economic Diversification and the tourism industries of the four western provinces. The purpose of the TSC is to increase professionalism in the tourism industry in Western Canada through the industry-led development of occupational standards and a challenge model certification process.

Two occupations, Food & Beverage Server (FBS) and Local Tour Guide (LTG), were selected to field test the certification process. The Alberta Tourism Education Council introduced a formative evaluation of the certification field test in the summer of 1992. The overall goal of this evaluation was to assess the response of the industry to the certification process, particularly from the candidate's perspective. Five objectives were defined to achieve the overall goal.

Objective #1: Identify problems regarding completeness, complexity and efficiency in the process documentation and correspondence.

Overall, the feedback about the documentation and correspondence was positive. Comments were received indicating that the documentation and correspondence needed "fine-tuning" in order to minimize the questions posed to the provincial TSC offices and to ensure that all participants were fully aware of their responsibilities and time lines.

Objective #2: Review the process and content of the written examination.

Both the candidates and the invigilators were satisfied with the process of the written examination. However, the communications with the candidates, particularly the instructions for the exam, were identified as needing clarification. There was some concern about the wording of some questions on the written examination.

Objective #3: Assess the process, content and format of the Performance Checklist/Review.

The field test participants were satisfied with the content and format of the Performance Checklist/Review. For the candidates and the supervisors who took the Performance Checklist/Review seriously, this step worked well to improve the skills of the candidates. Even candidates who had several years of experience found that they learned something while going through the checklist/review. While this step in the process appeared to work best when the supervisor was involved, candidates did successfully complete this step on their own. Support from the TSC office was instrumental in encouraging some candidates to complete this step.

Objective #4: Describe the perceived strengths and weaknesses of the Industry Evaluation and identify alternatives.

The Industry Evaluation was considered necessary to ensure the validity of the certification process. The strengths of the Industry Evaluation included its relevance to the occupation and its objectivity. Nearly all the Food & Beverage Servers and some of the Local Tour Guides thought the evaluator's identity should remain unknown until the interview. Evaluations conducted in contrived situations did not fairly evaluate the candidate's skills. The main challenge identified was the shortage of trained evaluators in the provinces. On-going training and support for the evaluators was needed to ensure that the evaluators were consistent and objective and to encourage their participation.

Objective #5: Gather perceptions and reflections on the certification process.

The field test participants were very pleased with the certification process overall. They perceived that certification improved the level of professionalism in the occupations of Food & Beverage Server and Local Tour Guide. The certified candidates had more self-confidence and their achievements were recognized by their employers, co-workers and/or customers.

Other Salient Findings

There were some concerns expressed about the format and content of the occupational standards upon which the certification process was based. As well, a need to review the certification prerequisites was identified. The participants thought that industry awareness of the standards and certification initiative was low across Western Canada.

Recommendations and Conclusions

The field test participants, particularly the candidates, were pleased with the certification process and the benefits of becoming certified. The key to the successful implementation of certification is ensuring that the candidates and the supervisors are well informed about the certification process, and maintaining the level of enthusiasm and interest necessary to complete the process. Improvements to each of the three steps in the certification process were identified and are now being acted upon. Many considerations have been identified for future revisions to the occupational standards upon which the certification process is based. Additional research projects are now underway to follow up on the data gathered through the formative evaluation.

It is critical that the marketing efforts of the T[illegible]ntroduce the cor[illegible]ot of certification to more professionals in the industry and convinc[illegible]em that certificati[illegible] is worthwhile, and, in fact, necessary to remain competitive in a dynamic industry.

1.0 INTRODUCTION

1.1 Background

The Alberta Tourism/Hospitality Education and Training Study (ATHETS - Mercer 1985) recommended the formation of an industry, education and government partnership to co-ordinate the development of training and educational initiatives in Alberta. The study also identified that a voluntary, standards-based certification system was needed to enhance the image and address many of the challenges facing the tourism industry.

Based on the recommendations of the ATHETS study, the Alberta government, in 1987, legislated the Alberta Tourism Education Council (ATEC) into being as a working partnership between industry, education and government. The mandate of the Council was to stimulate and co-ordinate the resources of the partnership to meet the present and future training and education needs of Alberta's tourism industry. One of the priority activities of the new Council was the industry-led development of occupational standards and certification, as identified in the ATHETS study. Concurrent with the formation of ATEC, similar directions were chosen in many provinces across Canada.

1.2 Tourism Standards Consortium

All four western provinces recognized the benefits and importance of tourism to their economy and realized that developing a skilled and motivated tourism labour force was key to the future success of tourism in Western Canada. The provinces also realized that the design and implementation of standards and certification for occupations in this industry could contribute significantly to enhancing professionalism for those in the industry, as well as attract people to the industry. The recognition of common challenges and the development of a co-operative infrastructure within each province and between the provinces prompted a meeting of the Ministers of Tourism of the four western provinces to sign a memorandum of understanding in March 1990.

The Tourism Standards Consortium (TSC) was formally established in October 1991 as a three-year co-operative project. The TSC is a partnership between the Tourism Education Councils of Alberta, Manitoba and Saskatchewan, the Pacific Rim Institute of Tourism in British Columbia, the provincial governments of Western Canada, Western Economic Diversification and the tourism industries of the four western provinces. The goal of the TSC is to enhance professionalism in the tourism industry through the co-ordinated efforts of the four western provinces. The objectives of this initiative include:

- effectively using resources
- validating 12 existing competency-based occupational standards
- developing competency based standards for 15 other priority occupations
- developing a certification process in the four provinces for 15 of the 27 occupations
- pilot testing the certification process based on the Alberta model
- reaching a uniform level of standards development
- building on the synergy created by the Tourism Industry Standards and Certification Committee

1.3 Standards and Certification

Occupational standards outline the knowledge, skills and attitude an individual must have and exhibit to be considered competent in an occupation. The development of these occupational standards is a process involving industry personnel in all four western provinces who define the content of the standards.

Certification is professional industry recognition of an individual's competency in his/her occupation. The TSC's competency-based certification process includes three distinct testing tools which are developed directly from the occupational standards: a written exam, a performance checklist/review and an industry evaluation. An individual challenging certification must successfully complete all three steps in the certification process. This process, unique to most certification programs, is candidate-driven and is designed to be completed while the candidate is working on the job.

1.4 Certification Field Test

The initial business plan of the TSC identified the need to pilot test the Alberta certification model in Western Canada in order to ensure the process was meeting the needs of the industry. The occupations of Food & Beverage Server (FBS) and Local Tour Guide (LTG) were selected as the two test occupations by the TSC. A total of 198 candidates in the four western provinces participated in the field test, which began in mid-1992.

1.5 Formative Evaluation

ATEC initiated a formative study of the certification process in the summer of 1992 to evaluate the implementation of the field test. The candidates registered in the TSC certification field test were asked to participate in the evaluation. The intent was to obtain feedback from all participants in the certification process, particularly the candidates. The information obtained from the participants will be used to improve the various aspects of the certification process. This is the report of that formative evaluation.

2.0 CERTIFICATION FIELD TEST

2.1 Steps in the Certification Process

A candidate challenging certification in Western Canada must successfully complete three steps to become certified. These steps are a written exam, an on-the-job performance review and an industry evaluation.

2.1.1 Step 1: Examination

- The multiple choice examination tests the candidate's familiarity with the knowledge component of the standards.
- Food & Beverage Server candidates are allowed three hours to write the 200-item exam.
- Local Tour Guide candidates are allowed one and a half hours to write the 80-item exam.

2.1.2 Step 2: Performance Checklist/Review

- The Performance Checklist/Review is derived directly from the standards and enables the candidate to practice the performance skills on-the-job. The supervisor can provide feedback for those skills which may need improvement, according to the standards.
- The Alberta Tourism Education Council (ATEC) and the Pacific Rim Institute of Tourism (PRIT) refer to this document as a Performance Checklist. The candidate initials each skill and both the candidate and the supervisor sign a signatory page. This page is then returned to the provincial TSC office.
- The Manitoba Tourism Education Council (MTEC) and the Saskatchewan Tourism Education Council (STEC) refer to the document as a Performance Review. The supervisor and the candidate sign each skill as the candidate masters it. A signed signatory page and the completed review must both be returned to the provincial TSC office.

2.1.3 Step 3: Industry Evaluation

- A trained evaluator observes the candidate on-the-job to ensure that the candidate possesses the skills required for certification. If not all skills are observed during the evaluation, the evaluator will interview the candidate to determine the candidate's competence.
- Food & Beverage Server evaluations are usually conducted incognito; the evaluator's presence is not disclosed until the interview stage of the evaluation.
- For Local Tour Guide evaluations, the candidate is usually aware that the evaluation is taking place.

The supervisor is encouraged to work with the candidate through the entire process. However, if the candidate is the supervisor, or if the supervisor is unable to participate, the candidate may complete the process on his/her own.

The successful candidate receives a certificate, a pin and the industry evaluation comments.

Candidates who are unsuccessful at any stage of the certification process are encouraged to remain in the process and challenge the steps again. Skills which require improvement are identified in order to assist the candidate in successfully completing the certification process.

2.2 Certification Criteria

When developing the certification tools for Food & Beverage Server and Local Tour Guide, representatives from the industry committees in the four western provinces identified specific criteria which must be met before a candidate can be certified.

2.2.1 Food & Beverage Server

To become certified, a candidate must achieve:

- Passing score of 73% on the written examination
- 12/14 skills on the industry evaluation
- 1200 hours of related work experience, or 12 months, full time

2.2.2 Local Tour Guide

To become certified, a candidate must achieve:

- Passing score of 76% on the written examination
- 4/4 critical skills and 6/6 desirable skills on the industry evaluation
- Standard First Aid and Basic Cardio-Pulmonary Resuscitation Certificates

2.3 Status of Field Test Certification Candidates

Members of the four provincial industry committees who developed the standards and certification tools were invited to participate in the field test. These industry professionals were asked to invite other people in the occupation to register. Several candidates were volunteered by their supervisor or manager. In Alberta, Food & Beverage Servers were also recruited through the Alberta Hotel Association. Thus, 198 candidates registered for certification in the occupations of Food & Beverage Server (FBS) and Local Tour Guide (LTG) in the four western provinces by May 1992.

The certification fee of $150 was waived for all the field test candidates.

Exam writings were held in May, June, July and October 1992. Rewrites were held in November 1992 and January, April and July 1993. A total of 122 Food & Beverage Servers and 61 Local Tour Guides had passed the examination, as of September 1, 1993. (The status of the candidates as of that date is presented in Table 2.1.)

Because of the flexibility of the certification process, some of the candidates quickly completed the performance review and were evaluated in early fall of 1992. As of September 1, 1993, 52 Food & Beverage Servers and 27 Local Tour Guides were certified in Alberta, British Columbia, Manitoba and Saskatchewan. Certificates and pins have been awarded to these successful candidates.

On September 1, 1993, another 10 Food & Beverage Servers and 22 Local Tour Guides were waiting to be evaluated. Others, who were still completing their performance reviews, indicated that they expected to be ready for evaluation within a few months. A few Local Tour Guides had not obtained the First Aid and Cardio-Pulmonary Resuscitation certificates required as prerequisites. Some of the candidates needed the encouragement of the provincial co-ordinator and/or certification assistant to complete the certification process.

Fifteen candidates, mostly Food & Beverage Servers, failed the written exam and did not register to rewrite. Some of these candidates reported that they had not received sufficient background information and had not had time to prepare for the exam. Others, who were working in the occupation for the summer, returned to school in September and were not interested in rewriting the exam. These candidates were judged unlikely to complete the process.

Another 35 candidates, who had started working on the checklist/review, offered reasons for no longer participating. These reasons were, in order of frequency of mention:

- no longer working in industry
- no longer working at establishment where process was begun
- no longer interested; too busy
- moved
- change in management

TABLE 2.1: STATUS OF FIELD TEST CANDIDATES
(as of September 1, 1993)

STAGE IN PROCESS	ALBERTA		BRITISH COLUMBIA		MANITOBA		SASKATCHEWAN		TOTAL	
	FBS	LTG	FBS	LTG	FBS	LTG	FBS	LTG	FBS	LTG
Failed Exam	5	0	5	1	3	0	1	0	14	1
Passed Exam, But Unlikely to Complete Process	8	4	5	2	3	1	12	0	28	7
Working on Performance Review	0	0	0	0	21	2	11	0	32	2
Waiting for Industry Evaluation	0	2	0	12	6	4	4	4	10	22
Still Need Prerequisites	0	0	0	2	0	1	0	0	0	3
Certified	10	11	14	14	9	2	19	0	52	27
TOTAL	23	17	24	31	42	10	47	4	136	62

3.0 THE PROJECT

3.1 Goal and Objectives

A formative evaluation of the certification field test across Western Canada was introduced by the Alberta Tourism Education Council in the summer of 1992. The overall goal of this evaluation was to assess the response of the industry to the certification process, particularly from the candidate's perspective. Five objectives were defined to achieve this goal:

Objective #1: To identify problems regarding completeness, complexity and efficiency in the process documentation and correspondence.

Objective #2: To review the process and content of the written examination.

Objective #3: To assess the process, content and format of the Performance Checklist/Review.

Objective #4: To describe the perceived strengths and weaknesses of the Industry Evaluation and to identify alternatives.

Objective #5: To gather perceptions and reflections on the certification process.

3.2 Design of the Project

3.2.1 Occupations

The occupations of Food & Beverage Server and Local Tour Guide were selected as priority occupations and were chosen for the formative evaluation.

3.2.2 Subjects

All participants in the TSC certification field test were asked to partake in the formative evaluation. Information was requested from the candidates, the exam invigilators, the candidates' supervisors, the industry evaluators, and the provincial co-ordinators and certification assistants.

3.2.3 Instruments and Procedures

The instruments and procedures used to obtain information from these participants are presented below. The telephone interviews were structured so that specific questions were asked to cue the interviewees. In the written questionnaires, questions asked for general comments and suggestions, which allowed the candidates to provide unstructured responses.

Candidates: The 198 candidates were considered the most important source of responses. The following instruments and procedures were used to ensure the candidates provided as much specific feedback as possible.

- Examinee questionnaire which was attached to all written examinations (Attachment A-1).
- Telephone interviews from the ATEC office with candidates who passed the written exam before February 1993 (Attachment A-2):
  - at the conclusion of the telephone interview, the candidates were asked to complete a mailed questionnaire with the intent of increasing the return rate of the questionnaire.
- Written questionnaire mailed to all candidates who passed the written exam before February 1993 (Attachment A-3):
  - questionnaire was mailed out within two weeks of the telephone survey and included a stamped return envelope to the ATEC office
  - for procedural reasons, Form A was intended for the Alberta candidates, while Form B was intended for the candidates in the other three provinces. However, only British Columbia candidates received Form B.
- Focus group discussions were held with certified Alberta candidates in Calgary and Edmonton (Attachment A-4).
- Follow-up telephone interviews were conducted from the ATEC office with certified candidates in British Columbia, Manitoba and Saskatchewan (Attachment A-5).

Invigilators: Telephone interviews were conducted with the invigilators after the candidates had written the exam (Attachment A-6). There were a total of 32 invigilators in the four provinces outside of the provincial TSC offices. The questions focused on communications with the provincial TSC office and on the exam.

Supervisors: 30 supervisors were telephoned when at least one of their employees had become certified. The questions on the survey (Attachment A-7) were designed to determine the supervisor's involvement in the certification process, particularly relating to the Performance Checklist/Review.

Industry Evaluators: Telephone interviews with the 25 industry evaluators were conducted from the ATEC office after many of the candidates had been evaluated (Attachment A-8). These interviews focused on the Industry Evaluation and how it could be improved.

Because some participants had more than one role (i.e. one person may have been a supervisor and an evaluator), they were telephoned only once and asked both sets of questions to minimize the number of times they were contacted.

Provincial Co-ordinators & Certification Assistants: The provincial co-ordinators and their certification assistants were contacted throughout the formative evaluation for updates on the status of the candidates. Telephone interviews were conducted in August 1993 to discuss comments received by the provincial TSC offices and to outline any changes made to the administration of certification.

3.3 Schedule and Changes

The ATEC development team, with the guidance of a research consultant, implemented the formative evaluation. Based on the objectives, a plan for the formative evaluation was developed in the summer of 1992. The initial drafts of the surveys were reviewed and revised in September 1992. The formative evaluation was conducted over several months as the candidates passed the exam, mastered the skills in the Performance Checklist/Review and became certified.

Original plans forecasted that the final report would be available in early 1993. However, the project was extended until the spring of 1993 to allow candidates more time to complete the certification process. A second extension was necessary in the spring of 1993 to allow a greater proportion of the field test candidates to become certified. The final deadline for obtaining data for the study was set for September 1993.

The schedule for the field test formative evaluation is presented in Attachment B.

3.4 Delimitations and Limitations of the Project

3.4.1 Delimitations

When the parameters for the formative evaluation were first established, certain decisions had to be made about the participants, the instruments and the procedures. These delimitations should be considered when reading the findings and conclusions of the formative evaluation.

First, candidates for two occupations were selected as comparisons. The results based on these two occupations may not always apply to other occupations.

Because many field test candidates participated in the development of the standards and/or the certification tools, they already had a clear understanding of the certification process. Therefore, they may have had more positive responses than candidates who were completely unfamiliar with the certification process.

Some candidates were volunteered by their supervisors or managers. These candidates may not be representative of other candidates who sign up for certification because of personal interest.

Candidates who withdrew from the certification process were not included in the formative evaluation. Candidates who did not pass the exam or did not complete the performance review were not interviewed for their perceptions of the certification process. As well, supervisors of the unsuccessful candidates were not interviewed.

The "Examinees' Questionnaire" was not designed specifically for the formative evaluation. Because the certification field test started before the formative evaluation, many of the candidates wrote the exam before a specific questionnaire could be designed to attach to the written exams.

Candidates who rewrote and passed the exam after January 1993 were only interviewed if they became certified. Their feedback was not obtained by the "Examinees' Questionnaire", the telephone interview or the written questionnaire. These candidates were not included because of the forecasted conclusion of the project in the spring of 1993.

An arbitrary deadline of September 1, 1993 was set and adhered to for the candidates to complete the certification process. Several of the candidates were still waiting to be evaluated or were completing their Performance Checklist/Reviews at the deadline (Table 2.1).

3.4.2 Limitations

The most significant limitation to the formative evaluation was the fact that the candidates did not complete the certification process as quickly as expected. This created several delays in the schedule of the formative evaluation, particularly in the interviews with the invigilators, supervisors and evaluators. Participants sometimes found it difficult to remember what had happened several months previously. The focus groups and follow-up telephone interviews with the certified candidates were also delayed. For some, this feedback was not requested until several months after they had become certified.

Contacting the field test participants often required numerous telephone calls. In some cases, they had moved or no longer worked for the original establishment. In other instances, the participants did not receive or did not return their telephone messages. Contacting the invigilators, supervisors and evaluators was more difficult than contacting the candidates, perhaps because the candidates were more closely involved in the certification process.

Many of the supervisors were not actively involved in the certification process and declined to provide feedback. Some of the evaluators had conducted only one evaluation and declined to respond to the questions because they did not have enough experience with the evaluation form and process.

Limitations with specific study instruments and procedures include:

- candidates in Manitoba and Saskatchewan should have received the same form of the written questionnaire as candidates in British Columbia, rather than the form the Alberta candidates received
- one supervisor and one evaluator participated in the Edmontor focus group, which may have inhibited the responses of some of the candidates
- there were no resources (time or dollars) to conduct focus groups in British Columbia, Manitoba and Saskatchewan
- timing of the telephone interviews sometimes conflicted with common holiday periods, e.g. December, January and August, which may have lowered the response rates

The delays in finalizing the formative evaluation may have delayed the implementation of changes to the certification process by the provincial TSC offices.

3.5 Analysis

The data obtained from the candidates were analyzed by province and occupation of the respondent. Descriptive analytical procedures were used, emphasizing measures of association and central tendency, such as frequency counts and percentages, means, medians and modes.

Small numbers of cases often resulted when cross-tabulation tables contained several cells (e.g. occupation, province, completion status). A high level of consensus was observed on many of the survey items. Because of these factors, two decisions were made regarding the statistical analysis:

- stringent significance levels were required before a difference was accepted ($p < .01$, or a likelihood less than 1% that the observed difference was due to chance alone)
- when consensus was high and all ratings on an item were uniformly skewed to the positive or the negative, a difference was not reported. For example, no difference was reported between "strongly agree" and "agree." Wherever such a distinction occurred on an item, even if the difference was statistically significant, it was reported that both groups "agreed" with the item.

In tables and other summaries, frequencies were used, rather than percentages. Again, this was to more accurately reflect the small numbers of cases comprising the analysis.

4.0 FINDINGS

Overall, the findings of the formative evaluation indicate that the industry in Western Canada was pleased with the certification process. However, there were some insightful suggestions for improving certification from the field test participants in all four western provinces. The following is a summary of the feedback received from all participants, categorized by objective. References, where appropriate, have been made to the Attachments which contain more detailed responses to the instruments.

4.1 Objective #1

The first objective of the formative evaluation was:

To identify problems regarding completeness, complexity and efficiency in the process documentation and correspondence.

All the field test participants surveyed were asked for their opinions about communications with the provincial TSC offices. The candidates provided most of the feedback through the telephone interview and the written questionnaire.

4.1.1 Communications with Candidates

The candidates appeared to be quite satisfied with the documentation and correspondence used in the certification process. During the telephone interviews (Attachment C-2), most of the candidates responded with "well" or "very well" when asked how well the information they had received had answered their questions about certification. When asked for comments or suggestions, the candidates stated that the information was clear, straightforward and informative, and that the process was easy to follow (Attachment C-4).

This positive response was reinforced in the written questionnaire (Attachment C-3). Of the 81 candidates who completed the written questionnaire, 76 agreed that they had received enough information to understand the certification process. However, nearly one-third of the candidates agreed with the statement, "There was a time in the process when I did not know what I was expected to do." The candidates were satisfied with the provincial TSC offices' responses to their enquiries. The comments provided about the documentation and correspondence did not focus on any particular issues or concerns (Attachment C-4). However, there was a recommendation made during the focus group discussions to keep everything in "layman's terms" (Attachment C-5).

4.1.2 Communications with Invigilators

The invigilators were also satisfied with the documentation and correspondence used in the certification process. All the invigilators interviewed felt that their enquiries were responded to promptly by the TSC provincial offices (Attachment D).

4.1.3 Communications with Supervisors

More than half of the supervisors interviewed stated that they had not received any specific information from the provincial TSC offices (Attachment E). However, those who had received information felt their role had been explained well. Supervisors who contacted a provincial TSC office to clarify an issue stated that the office responded well.

4.1.4 Perceptions from the Provincial TSC Offices

The provincial co-ordinators and certification assistants felt that the documentation and correspondence were confusing and that there was too much paperwork involved for the candidates. A need was identified for one person to be dedicated to certification in each province. This person would provide ongoing support to the candidates. Reminder telephone calls and personal meetings were more effective than letters when persuading the candidates to complete the certification process.

4.1.5 Summary

Overall, the feedback about the documentation and correspondence was fairly positive. Some candidates and/or their supervisors had been involved in the industry committees which developed the standards and the certification tools. It is possible that, in being more familiar with the process, they therefore had fewer problems with the documentation. However, there were comments indicating that the documentation and correspondence needed "fine-tuning" in order to minimize the questions posed to the provincial TSC offices and to ensure that all participants were fully aware of their responsibilities and time lines.

4.2 Objective #2

The second objective of the formative evaluation was:

To review the process and content of the written examination.

The candidates and the invigilators were asked for their perceptions about the administration of the first step in the certification process, the written examination.

4.2.1 Exam Information

Most of the candidates who completed the written questionnaire responded that the examination information package clearly indicated the date and location of the exam (Attachment C-3). These candidates agreed that the sample test questions provided were helpful. Nearly all of the candidates indicated that the instructions at the beginning of the examination were clear. They also stated that the invigilator provided adequate direction.

However, there were several unprompted comments identifying the need for clearer instructions, specifically outlining the time allowed, the number of questions, the exact room location and sample questions (Attachment C-4). Other comments stated that the computer answer sheet was confusing and needed a better explanation.

4.2.2 Preparation for Exam

Candidates indicated that they spent an average of 9.2 hours studying for the exam (range=80 hours, mode=3 hours) (Attachment C-3). This figure was lowest in Alberta, possibly because some of the candidates did not find out about the written exam until a few days before writing it. Two-thirds of the candidates stated that they had expected to study as much as they had. In the written questionnaire, some of the candidates indicated that they needed more time to prepare for the exam, while an equal number stated they needed less time.

4.2.3 Alberta

During one exam writing in Alberta, the exams were missing every other page. This created confusion and stress for the candidates (Attachment C-4). Comments about this mishap emphasized the need to ensure that all materials sent out of the offices were complete.

4.2.4 Invigilators

According to the invigilators, arrangements were made well enough in advance (Attachment D). Nearly all of the invigilators reviewed the instructions with the candidates and felt the candidates had clear instructions for writing the exam. One invigilator commented that there were no instructions explaining how to complete the answer sheet.

Questions asked by the candidates included:

- length of exam, both in time and number of questions
- clarification of exam questions
- when results would be out
- how to fill in answer sheet

In order to better respond to the candidates' questions, one invigilator asked to receive a copy of the instructions given to the candidates.

All of the invigilators interviewed indicated that they were willing to invigilate another exam.

4.2.5 Exam Questions

Some negative feedback was received regarding the exam questions. Several candidates found the wording confusing or ambiguous (Attachment C-4). They also indicated that there were repetitive questions and questions with more than one right answer.

Other candidates felt that the exam was clear and comprehensive. Some candidates commented that the exam was too easy or basic.

4.2.6 House Policy

The difference between house policies and the content in the standards and the exam seemed to confuse the candidates (Attachment C-4). One respondent identified the need to ensure that candidates knew the exam was based entirely on the standards. This concern about house policy was also reflected in the comments about the occupational standards (Attachment H).

4.2.7 Relevance of Exam

In the Examinees' Questionnaire, nearly all the candidates indicated that the exam was fair and that the material on the exam was relevant to the occupation (Attachment C-1). As well, most of the candidates stated that the exam reflected the day-to-day activities of the occupation. Many telephone respondents reinforced this perspective by stating that the exam tested their knowledge of the occupation well (Attachment C-2).

However, more than one-third of the candidates completing the Examinees' Questionnaire stated that some of the knowledge on the exam was not necessary for day-to-day work (Attachment C-1). This perception was supported by unprompted comments from the telephone and written surveys mentioning that some of the questions were not applicable (Attachment C-4).

4.2.8 Exam Results

According to the written questionnaire, the candidates understood the breakdown of their exam results and they received adequate detail (Attachment C-3). However, in the comments section, there were a few statements about the need for a more detailed breakdown of exam scores which would indicate to candidates which questions were answered incorrectly (Attachment C-4).

4.2.9 Summary

Both candidates and invigilators appeared to be satisfied with the process of the written examination. The communications with the candidates, particularly the exam instructions, were not always perceived as complete, concise and easy to understand. Some candidates were unfamiliar with the computer answer sheet and recommended a clear explanation of how to complete the answer sheet be included.

There seemed to be some concern about the questions on the written examination. Some candidates found the wording of the questions confusing or ambiguous. As well, some candidates reported that they had difficulties selecting the correct answer because of differences between the standards and house policies.

4.3 Objective #3

The third objective of the formative evaluation was:

To assess the process, content and format of the Performance Checklist/Review.

The second step in the certification process, the Performance Checklist/Review, required the most initiative by the candidates. Each candidate either worked independently or with a supervisor to master the skills listed in the Performance Checklist/Review. Both candidates and supervisors were given the opportunity to comment about this step of the process.

4.3.1 Administration

Instructions: The instructions at the beginning of the Performance Checklist/Review were clear, according to 84% of respondents to the written questionnaire (Attachment C-3).

Support from TSC Office: Challenges faced by the provincial co-ordinators and certification assistants included timely and consistent communications with candidates to identify potential problems before they escalated and candidates lost interest. Candidates without management support needed lots of encouragement during this step in the process.

Recommendations from the focus groups identified the need for more pressure on the candidates from the provincial TSC office (Attachment C-5). The participants agreed that a telephone call was more effective than a letter in motivating the candidates to finish the process. The focus group participants thought the time lines should be stricter and that a year in the process was too long.

Timing of Performance Checklist/Review: When candidates were asked if they would prefer to receive the checklist/review before writing the exam, 36 agreed, 28 disagreed and 17 were undecided (Attachment C-3). British Columbia was the only province in which candidates indicated a preference to receive the Performance Checklist/Review before writing the exam. Local Tour Guides responded more favourably to receiving the Performance Checklist/Review before writing the exam.

Information to Supervisors: There was a key recommendation from the certified candidates that the provincial TSC office inform the supervisors and management about the certification process (Attachment C-5, C-6). Supervisors needed more information to convince them to become involved and to explain what their role should be. This information must be worded carefully so as to not offend any supervisors by telling them how to train and evaluate their staff.

Sign Off Page: There seemed to be a low return rate of the Signatory Page, possibly because the candidates did not understand the importance of returning the page to the provincial TSC office.

The candidates were equally split over whether the supervisor should sign only the signatory page or not (Attachment C-3). In British Columbia, the candidates stated it would be most beneficial if the supervisors signed off each category, rather than each skill. Half of the supervisors indicated that they preferred to complete a summary of the major categories (Attachment E). They offered the following reasons:

- not too specific
- easiest and most efficient method
- identifies skills which are excellent and skills which need improving
- provides an overall assessment

Only two supervisors felt it was necessary to sign each skill in the checklist/review to ensure that there were no doubts or ambiguities and because it was too easy for supervisors to sign off just one page.

Certified candidates indicated that supervisors should select a signing option, depending on each situation. The candidates felt that there were several factors to consider, such as the candidate's experience, skill level and motivation (Attachment C-6).

4.3.2 Mastering the Skills

Most of the candidates believed the Performance Checklist/Review helped them master the skills outlined in the standards (Attachment C-3). As well, many of the candidates agreed that the checklist/review helped them to identify skills that they needed to improve. The checklist/review was considered useful for both training and evaluating by the candidates and the supervisors.

Time Required: Candidates took an average of 14 hours to complete the checklist/review (range=160 hours, median=10 hours) (Attachment C-3). Just over half of the candidates completed the Performance Checklist/Review in five hours or less. The first evaluations were conducted three months after the first exam writing.

More than two-thirds of the candidates expected they would spend the amount of time they did to complete the checklist/review (Attachment C-3). Only 16% of the candidates stated they needed more time to master the skills.

Nearly one-quarter of those candidates worked with their supervisors for an hour. The amount of time that the supervisor and the candidate worked together varied from one hour to 24 hours. More than eighty percent of the candidates worked with their supervisors for five hours or less. Again, most candidates stated that this was "about the amount of time" they had expected.

This second step seemed to work especially well in operations where several employees went through certification together.

Difficulties with the Performance Checklist/Review: Almost one quarter of the candidates stated that they had difficulties with the Performance Checklist/Review (Attachment C-3). Of these, more than half were unable to obtain the necessary assistance from their supervisors. The most frequently mentioned problems with the Performance Checklist/Review were that the skills were not relevant and that the supervisor was too busy to help.

In one situation, the management changed and many of the candidates did not complete the process because their previous supervisor had not returned their performance reviews.

House Policies: Most certified candidates expressed slight or no problems with conflicts between house policies and skills in the Performance Checklist/Review (Attachment C-6). During the follow-up telephone interviews, candidates had to take time to recall exactly what the discrepancies were.

4.3.3 Supervisor Involvement

The candidates' opinions about the involvement of their supervisors varied notably. Many of the candidates believed they would benefit from having their supervisors involved while they completed the Performance Checklist/Review (Attachment C-3). However, several of the candidates commented that they did not have a supervisor or that the supervisor was not actively involved in the certification process (Attachment C-4).

Focus group discussions indicated that the supervisors did not always have time to go through the Performance Checklist/Review, but that it was very beneficial to candidates to have their supervisors involved (Attachment C-5). Comments from the follow-up telephone interviews indicated that the supervisor should be available to answer questions, but did not necessarily need to become any more involved in the certification process (Attachment C-6).

The supervisors interviewed held dichotomous views on the role of the supervisor in the certification process (Attachment E). Some of the supervisors stated that supervisors should work closely with the staff as they completed the certification process. Other supervisors thought that they should not become directly involved, because certification should be each employee's initiative. This attitude was reflected in the approach each supervisor took when completing the Performance Checklist/Review with the candidate.

The Performance Checklist/Review was used as both a training and an evaluation tool by the supervisors (Attachment E). Some of the supervisors used the checklist/review to improve the skills of the employees through skill-specific training. A couple of supervisors incorporated the standards into their training programs. When evaluating their employees, the supervisors observed employees at work and identified their strengths and weaknesses according to the standards.

Some supervisors participated in one-on-one discussions with the candidates as they worked through the Performance Checklist/Review. Together they identified strengths and weaknesses. Several supervisors stated that they did not provide any assistance to their employees.

According to the supervisors, the amount of time supervisors and candidates worked together varied from two hours to some months (Attachment E). For most of the supervisors, the amount of time involved was what had been expected. None of the supervisors stated the amount of time required was more than expected.

There was also a recommendation from some of the supervisors that supervisors should be certified (Attachment E). This was supported by comments from some of the certified candidates (Attachment C-6). They felt that it would be ideal if the supervisor was certified, although that it was not realistic to expect all supervisors to be certified.

4.3.4 Format of the Booklet

Only three candidates indicated that the physical layout made the checklist/review difficult to understand (Attachment C-3).

During the focus groups, Local Tour Guides thought letters of reference would increase the perceived importance of the Performance Checklist/Review (Attachment C-5). Other suggestions included using questions, such as true/false or fill-in-the-blanks, to quiz candidates as they mastered the skills.

One supervisor questioned whether the Performance Checklist/Review was a necessary step in the certification process and recommended, instead, a summary to be included at the end of the standards (Attachment E).

4.3.5 Summary

The field test participants appeared to be satisfied with the content and format of the Performance Checklist/Review. For the candidates and the supervisors who took the Performance Checklist/Review seriously, this step worked well to improve the skills of the candidates. Even candidates who had several years of experience found that they learned something while going through the checklist/review. However, for those less motivated candidates, stricter time lines, more detailed instructions and external support from the provincial TSC office were needed. While this step in the process appeared to work best when the supervisor was involved, candidates did successfully complete this step on their own. Because this step was candidate-driven, candidates expressed the need to have more flexibility, depending on their situation.

4.4 Objective #4

The fourth objective of the formative evaluation was:

To describe the perceived strengths and weaknesses of the Industry Evaluation and identify alternatives.

Opinions about the Industry Evaluation were obtained from the candidates through the focus groups and follow-up telephone interviews, and also from the supervisors and evaluators. The strengths and weaknesses of the industry evaluation are presented below. Because everyone interviewed recognized the necessity of the Industry Evaluation as a step in the certification process, no suggestions for alternative methods of evaluating the performance of the candidates were offered.

4.4.1 Timing of Evaluation

Some of the candidates and supervisors were concerned about the timing of the evaluations (Attachment C-4, Attachment E). They noted that the evaluation should have taken place when the candidate was busy enough that all the skills were observable, but not when the staff were too busy. One evaluator commented that the timing of the evaluations was critical to ensure that the candidate was tested fairly (Attachment F).

Unfortunately, some of the candidates waited to be evaluated for months because evaluations could not be arranged. There were not enough trained evaluators to conduct the evaluations when required.

4.4.2 Consistency and Objectivity

Many of the evaluators and certified candidates thought the evaluation accurately reflected the occupation and that the evaluation was a fair test of the candidate's skills (Attachment C-6, Attachment F). Most of the evaluators thought the evaluation form required them to evaluate the candidates consistently (Attachment F). However, they recommended that more examples and specific prompts be provided for evaluators, especially for the interview. There was also a suggestion from several evaluators to include a section for overall impressions of the candidate on the evaluation form.

While many evaluators agreed that the evaluation form did allow for some subjectivity, one evaluator thought it should be more subjective and only a few thought it should be less subjective (Attachment F). The evaluators noted there was some flexibility for house policy and the server's personality, but there was not "room for the evaluator's personal bias to fail [candidates] who would pass by different evaluators." However, a few supervisors thought that the evaluation was too subjective (Attachment E).

4.4.3 Incognito Evaluations

Local Tour Guides and Food & Beverage Servers who participated in the focus groups agreed that the evaluation should be conducted incognito for an accurate evaluation (Attachment C-5). The follow-up telephone interviews with the certified candidates confirmed a preference towards incognito evaluations (Attachment C-6). However, many certified candidates did not care whether or not they knew who the evaluator was. Contrived situations were difficult for both the candidates and the evaluators. Supervisors should have been more co-operative by arranging schedules and not informing the candidates. Some of the evaluators cautioned that the evaluator may get "schmoozed" once the candidate knew the evaluator (Attachment F).

Only two Local Tour Guide evaluators stated that the evaluation should not be conducted incognito (Attachment F). These evaluators believed that candidates would not change their performance when they were aware of the evaluator. Some certification candidates stated that it was difficult for Local Tour Guides to not be aware of the evaluator (Attachment C-6).

4.4.4 Evaluators

One of the critical challenges identified by the provincial co-ordinators and certification assistants was the need for more trained evaluators. The evaluators were volunteers and put their own jobs first, therefore they were not able to conduct evaluations whenever required.

There was a need identified for on-going training and follow-up for evaluators to ensure their continued participation, and to maintain their objectivity and consistency (Attachment F). While most of the evaluators responded that the initial training prepared them for the evaluations, some commented that they had relied on their previous experiences. Recommendations from the evaluators identified the need for more specific training for the evaluators, and the need for the evaluator to know what information the candidate receives about the evaluation (Attachment F). The evaluators felt they benefitted from the practice evaluation and the discussion afterwards. One evaluator commented that it would be beneficial to share ideas with other evaluators after they had evaluated a few candidates.

The focus group candidates recommended that the evaluators be experienced and certified in the occupation (Attachment C-5). The candidates felt it was critical that the evaluator be matched to the situation. As well, it was pointed out that the evaluator should not correct the candidate during the evaluation.

4.4.5 Interview

Almost all the evaluators conducted interviews after the evaluations (Attachment F). While one evaluator commented that it was a critical step in the evaluation, another commented that it was sometimes difficult for the candidate to take time away from work.

During the focus group discussions, the candidates thought the interviews were necessary to clarify house policy and to obtain immediate feedback (Attachment C-5). However, they expressed a desire that the written results include notes from the interview.

The candidates recommended that the evaluator provide some feedback to the candidate during the interview (Attachment C-5, C-6). Candidates could immediately correct or improve their skills. As well, this feedback could alleviate concerns about the evaluation.

4.4.6 Evaluation Results

According to the focus group participants, the written results of the Industry Evaluation were not detailed enough and should include a section about the interview (Attachment C-5). It was suggested that the comments be related to specific standards. Candidates should not be criticized for their performance if they were following house policy.

4.4.7 Other Comments and Suggestions

A recommendation offered to improve the evaluation was to make it stricter, particularly regarding "suggestive selling" and "handling tableware" for Food & Beverage Servers and "providing accurate information" for Local Tour Guides (Attachment F).

It was suggested that Food & Beverage Server evaluators dine with at least one other person to observe the server interacting with more than one guest. Evaluators felt the Local Tour Guide evaluation should be conducted during a group tour.

Nearly half of the evaluators stated that they had encountered problems while conducting the evaluations (Attachment F). Several of the evaluators felt uncomfortable with parts of the evaluation. The unprompted comments about the evaluation included a wide variety of feedback about all aspects of the evaluation, from difficulties identifying candidates without name tags to finding something legitimate to complain about.

4.4.8 Summary

The strengths of the Industry Evaluation included its relevance to the occupation and its objectivity. Nearly all of the Food & Beverage Servers and some of the Local Tour Guides thought the evaluator's identity should remain unknown until the interview. The Industry Evaluation was considered necessary to ensure the validity of the certification process.

One of the main weaknesses of the Industry Evaluation was the shortage of trained evaluators in the provinces. Training and support for the evaluators needed to be improved to ensure that the evaluators were consistent and objective and to maintain their buy-in. Evaluations conducted in contrived situations did not fairly evaluate the candidate's skills.

4.5 Objective #5

The fifth objective of the formative evaluation was:

To gather perceptions and reflections on the certification process.

4.5.1 Benefits of Certification

Certified candidates were very positive when asked for their overall perceptions of the certification process. The certified candidates stated that they were more confident and had higher self-esteem since becoming certified (Attachment C-5, C-6). Even those who had worked in the occupation for years indicated that they had learned something new during the process and had become more aware of the skills required for their work. Some certified candidates stated that this addition to their résumés was the largest bonus.

Recognition that certified candidates received included:

- recognition by peers
- opportunities for promotion/advancement
- wage and/or gratuity increases

Some of the Local Tour Guides commented that guests on their tours asked for their pins, even offering to buy them. At one establishment, the TSC newsletter, with names of the certified candidates, was circulated among the staff. Many said they perceived higher morale at work as a result of certification.

Some of the certified candidates were trained as evaluators through the provincial TSC offices. As well, some certified candidates began providing assistance to other candidates working through the process.

The focus group participants commented that certification increased the occupations' credibility by improving the level of professionalism (Attachment C-5). All of the focus group participants agreed that "it's about time this happened."

When the supervisors were asked if they would be encouraging other employees to register for certification, all but one said yes (Attachment E). This one supervisor was undecided at the time of the interview. Most certified candidates stated they would recommend certification to others and many had already encouraged friends or co-workers to register for certification.

4.5.2 Challenges to Certification

The most frequently mentioned concern with certification was the cost; many supervisors thought the $150 fee was too expensive (Attachment E). One supervisor was glad the cost would be split by Workforce 2000. In the focus groups, the comment was made that some tour companies could not afford to pay more for certified guides, but would hire them because less training would be required (Attachment C-5).

4.5.3 Summary

The field test participants were very pleased with the certification process overall. They perceived that certification improved the level of professionalism in the occupations of Food & Beverage Server and Local Tour Guide. The certified candidates had more self-confidence and self-esteem and their achievements were recognized by their employers, co-workers and/or guests.

4.6 Other Salient Findings

During the formative evaluation, there were comments made about specific topics which were not identified in the initial objectives of the project: the standards upon which the certification process was based, the certification prerequisites, and industry awareness of the standards and certification initiative. Because these comments were uncued, we believe the people who provided this feedback felt strongly about these issues.

4.6.1 Standards

Some candidates found it difficult to read the standards, particularly because of the layout (e.g. point form, columns) and wording (Attachment G). There were some concerns about the relevance of some skills in the standards. Some candidates noted that their house policy differed from the standard and questioned which one was "correct."

Many of the supervisors indicated that the standards were very good and provided an excellent starting point (Attachment E). However, the supervisors also had concerns about the difference between the standards and house policies. Those interviewed thought it would be beneficial if supervisors were given the opportunity to purchase their own reference copy of the standards. Rationales offered identified that supervisors could use the standards:

- as a reference for training
- to improve the level of professionalism and consistency on the job
- to be informed about what the candidate was learning

4.6.2 Certification Prerequisites

There seemed to be two opposing views on the certification prerequisites for Local Tour Guide. Some candidates were still in the certification process because they had not obtained their first aid and cardio-pulmonary resuscitation certificates (Table 2.1). Some commented that the prerequisites were too strict and that they should be lowered. Specifically, it was thought that the requirement for a Standard First Aid certificate should be changed to an Emergency First Aid certificate. However, during the focus group discussions the certified candidates thought that the prerequisites were very important and should not be removed from the certification criteria (Attachment C-5).

4.6.3 Marketing

Some of the focus group participants felt that certification was not considered really important by the industry yet (Attachment C-5). The supervisors recognized that certification was "great so far, but going slow" and that there would be more impact in the industry when more people were certified (Attachment E). The certified candidates indicated that there needed to be a greater awareness of certification and of the provincial TSC offices by the industry (Attachment C-5, C-6).

4.6.4 Summary

There were some concerns expressed about the occupational standards upon which the certification process is based. As well, the need to review the certification prerequisites was identified. Field test participants thought there was low industry awareness of the standards and certification initiative across Western Canada.

5.0 RECOMMENDATIONS & CONCLUSIONS

Based on analysis of data collected from participants in the field test, the following key recommendations have been forwarded. The recommendations presented here apply to all four western provinces and to both occupations. Some of these recommendations have already been acted upon as the certification process has evolved in each province.

5.1 Communications with Candidates

The certification process is candidate-driven and therefore the candidates must be the number one focus of all certification activities. There needs to be one person dedicated to certification in each provincial TSC office. This person's key responsibilities should include communicating with the candidates and providing support when needed.

All correspondence should be concise and easy to understand. Coloured pages would identify the forms that must be returned to the provincial TSC offices. Telephone calls are more personal and effective than letters and should be used whenever possible. The candidates were not always self-motivated and needed reminders to complete the process. Regular contact, possibly on a pre-determined schedule, may be time consuming, but would encourage the candidates to continue with the process and would reveal problems before becoming unresolvable.

The content of the documents needs to be revised for clarity and conciseness:

- exam information should clearly explain the location, start time and time allowed for the exam, as well as how to fill in the computer answer sheet
- breakdown of the exam scores should be more detailed, e.g. specify which standards relate to questions which were answered incorrectly
- performance review instructions should emphasize the importance of this step and the necessity of returning the signatory page
- feedback from the industry evaluation should be more detailed and related to specific skills in order to assist the candidates in improving their [illegible]s
- house policy in relation to the standards, the exam, the p[illegible]rmance review, and the industry evaluation must be clarified
- candidate's and supervisor's roles should be very clearly explained

Actions to Date: Since the field test began, PRIT, MTEC and STEC have hired certification assistants to co-ordinate certification and to provide support to the candidates. (Alberta already had a certification assistant.)

Each provincial office is currently revising all documentation sent to the candidates to clarify the information provided. The documentation may be tailored somewhat to each province. The language has been simplified and graphics are being included to ensure candidates understand what is expected of them. PRIT is using coloured paper to identify all forms that must be returned to the British Columbia office.

5.2 Communications with Supervisors

The importance of the supervisor in supporting and motivating the candidates to complete the certification process is becoming more and more evident. Communications between the provincial TSC offices and the supervisors should be increased and improved.

The supervisor's buy-in to the certification process is critical, even at the earliest stages of the candidate's participation. An introductory letter should:

- outline the certification process
- outline the roles of the candidate and supervisor
- provide clear expectations of the time commitment
- provide an opportunity to purchase a copy of the standards
- clarify how to deal with house policy if it differs from the standards, the exam, the performance review and the industry evaluation
- emphasize the importance of the performance review and the industry evaluation
- encourage recognition of the candidate's achievements
- avoid offending the supervisors by telling them how to manage, train and evaluate their employees

Supervisors may require support and encouragement as well. Again, telephone or personal contact may be more effective than a letter.

Actions to Date: More detailed information is now provided to the supervisors to ensure that they understand the process and what is expected of them and of the candidates. In Manitoba, the supervisors receive their own copy of the performance review.

5.3 Steps in the Certification Process

5.3.1 Written Exam

The questions in the written exams need to be edited for clarity of language and format. The questions need to be matched with the standards to ensure the correct answers are provided and keyed. Duplicate and repetitive questions should be noted for future revisions.

As well, the instructions for the exams need to be reviewed to ensure that the candidates know the date, time and location of the exam, and how to complete the computer answer sheet. The instructions should clearly indicate that the "correct" answers to the questions are based on the standards, rather than on house policies.

Actions to Date: The Food & Beverage Server test bank has been edited with consideration of English as a Second Language candidates. Members of the Local Tour Guide industry committee revised the items in the test bank for Local Tour Guide to clarify the wording of the questions.

The system for generating and distributing exams and for ensuring their completeness has been improved by the ATEC office.

5.3.2 Performance Checklist/Review

This second step in the process requires a great deal of self-motivation by the candidates. Improved communications with the candidates and the supervisors should reduce the number of candidates who do not complete this step in the certification process. The roles of the candidate and the supervisor need to be clearly explained and the importance of completing the Performance Checklist/Review needs to be emphasized.

More flexibility in this step of the certification process could ensure that the Performance Checklist/Review could be adapted to each candidate's situation.

Each provincial TSC office needs to provide support to the candidates if they are not self-motivated, or are unable to complete the certification process independently. For candidates without supervisors, the provincial TSC office could arrange for a certified peer to become involved.

The supervisor should have to sign off a summary of the skills listed in the Performance Checklist/Review as the candidate masters them. This would provide an overall assessment of the candidate's performance in order to identify the candidate's strengths and weaknesses and to track the candidate's progress. Whenever possible, the supervisor and candidate should be encouraged to work together to complete this summary. Once the candidate has mastered all the skills, the summary should be returned to the provincial TSC office.

Actions to Date: All four provinces now refer to the second step in the certification process as a "review." A listing of the skills that are in the Performance Review has been developed for each occupation to encourage the supervisors to work more closely with the candidates. This listing is mailed to the supervisors when the Performance Review is mailed to the candidates.

In Manitoba, this listing of skills is mailed with a copy of the Performance Review to the supervisor. Candidates in Manitoba receive the Performance Review with the standards to encourage them to practice the skills while studying for the exam.

Candidates may begin working on the Performance Review before they write the exam if they prefer. This allows the candidates more flexibility when preparing for the written exam and the Industry Evaluation.

A manual called "Using Standards for Training" has been prepared to provide guidelines for training to the supervisors.

5.3.3 Industry Evaluation

Several certified candidates need to be recruited as industry evaluators. The training for the evaluators should be improved so that the evaluators are better prepared for their first evaluations. At least one practice evaluation and follow-up discussion should be included in each training session. Follow-up training would be beneficial to maintain the evaluators' interest and to ensure consistency of the evaluations. This would provide evaluators with an opportunity to meet with other evaluators and discuss what works and what creates difficulties when conducting evaluations.

Contrived situations need to be avoided, even if this is the easiest and most convenient arrangement to make. However, in certain situations and only when necessary, the certification assistants must be flexible and creative in arranging a contrived evaluation that will fairly test the candidate according to the Industry Evaluation.

Every effort must be made to keep the identity of the evaluator from the candidates. This is particularly important for Food & Beverage Servers. For some Local Tour Guide evaluations, it may be impossible to keep the evaluator "incognito." In these instances, the guide must still conduct a group tour so that the evaluator can evaluate the interpersonal skills of the guide.

Actions to Date: Certified candidates have been trained as evaluators in each of the provinces in order to reduce the demands placed on the original evaluators. The training sessions for evaluators are more formalized and thorough. MTEC now arranges review sessions with evaluators after they have completed a few evaluations.

5.4 Future Revisions

There have been some concerns expressed about the content of the occupational standards, upon which the certification tools have been based. When the standards for Food & Beverage Server and Local Tour Guide are reviewed in 1994, the following points should be considered by the industry committees:

- differences between the standards and house policies:
  - are the skills outlined in the standards representative of the industry in general?
- reading level of the standards:
  - is the language easily understood?

- format of the standards:
  - are the standards easy to read?
  - can the standards be readily transferred into in-house training programs?
- development of training support materials
- blueprint for the written exam:
  - should the weighting of the categories be revised?
- number of questions on the written exam
- time limit for completing certification process, especially the Performance Review
- skills listed on the Industry Evaluation:
  - are there any ambiguities in the skills which may create challenges for the Industry Evaluation?
  - is there enough detail in the standards to ensure the evaluations are consistent and objective?
- passing scores on the Industry Evaluation:
  - are there any skills that are always or never passed?
- certification prerequisites:
  - are the certification prerequisites necessary and are they clearly defined?

5.5 Promotions by TSC

If certification is to become accepted and even demanded by the industry, greater promotion of the standards and certification initiative across Western Canada is necessary. Awareness of certification is still fairly low and efforts must be made to communicate the benefits of certification to everyone in the industry.

Actions to Date: The TSC developed a thorough marketing plan in early 1993 to increase awareness and interest in standards and certification across Western Canada.

5.6 Additional Research

5.6.1 Follow-up with Unsuccessful Candidates

One significant delimitation of the formative evaluation was the decision to not follow-up with candidates who had dropped out of the certification process. Given the fairly high proportion of field test candidates who are not yet certified, a follow-up study may provide some insight into the factors affecting these unsuccessful candidates.

Actions to Date: Discussions at recent TSC meetings have identified the necessity of a follow-up study and initial planning for such a study is currently underway.

5.6.2 Other Occupations

Projects similar to this formative evaluation in occupations other than Food & Beverage Sever and Local Tour Guide may identify different challenges facing those candidates.

5.6.3 Comparative Study

In June 1993, the Tourism Standards Consortium, in co-operation with the Tourism Industry Association of Nova Scotia, began a comparative study to determine the impacts of standards and certification on Food & Beverage Servers and Front Desk Agents, and the subsequent effects on business. A pre-test, post-test method is being used to determine the changes in the knowledge, skills and attitude of Food & Beverage Servers and Front Desk Agents. As well, business data and guest comments are being collected on a monthly basis from the participating properties. Results of this study will be released in mid-1994.

5.7 Conclusions

Overall, the industry in Western Canada appears to accept the certification process for Food & Beverage Server and Local Tour Guide. The candidates, in particular, are very pleased with the certification process and the benefits of becoming certified. The field test identified some key challenges for the provincial TSC offices when administering certification. Many actions have already been initiated to address these challenges.

The key to the successful implementation of certification is ensuring that the candidates and the supervisors are completely informed of the certification process and that they maintain the level of enthusiasm and interest necessary to complete the steps. Improvements to each of the three steps in the process were identified and are now being acted upon. Many considerations have been identified for future revisions to the occupational standards upon which the certification process is based. Additional research projects are now underway to follow up on the data gathered through the formative evaluation.

It is critical that the marketing efforts of the TSC introduce the concept of certification to more professionals in the industry and convince them that certification is worthwhile and, in fact, necessary to remain competitive in a dynamic industry.

GLOSSARY

candidate	-	person who has registered for certification
evaluator	-	individual who has volunteered to conduct Industry Evaluations
food & beverage server (FBS)	-	professionally qualified service attendant; duties may include order-taking, food and beverage service, cleaning and setting of tables, station maintenance, presentation of check to guests, and processing of payments
house policy	-	includes both written and unwritten codes of conduct specific to an establishment or operation
incognito evaluation	-	candidate does not know that evaluation is taking place
Industry Evaluation	-	observation of candidate on-the-job by an evaluator
invigilator	-	person who supervises the written exam; usually at an educational institution
local tour guide (LTG)	-	professionally qualified guide whose duties may include escorting or transporting individuals or groups on local tours, ensuring prepared itineraries, transportation and accommodation requirements are met, describing points of interest and planning and overseeing recreational activities. LTG may also be sightseeing, establishment, on site, or step-on guides.
participant	-	general term for anyone who participated in the field test, including candidates, invigilators, supervisors and evaluators
performance checklist/ review	-	document which outlines all the performance skills a candidate must master before being evaluated
provincial TSC offices	-	Alberta Tourism Education Council, Manitoba Tourism Education Council, Pacific Rim Institute of Tourism (BC) and Saskatchewan Tourism Education Council
supervisor	-	person who the candidate is accountable to; may be the manager or owner
TSC	-	Tourism Standards Consortium (Western Canada)

ATTACHMENT A-1

TOURISM STANDARDS CONSORTIUM
Certification Exam

EXAMINEE'S QUESTIONNAIRE

NAME _____ _____

Please answer the following questions which deal with your opinions about the examination. Circle your response.

1. What is your opinion about the amount of time allotted for this examination?

1. Far too little time.
2. Too little time.
3. About the correct amount of time.
4. Time to spare.
5. Much time to spare.

2. The wording on the test items was:

1. Poor.
2. Confusing.
3. Awkward.
4. Clear.
5. Very clear.

3. In terms of difficulty, the examination was:

1. Very difficult.
2. Difficult.
3. About right.
4. Easy.
5. Very easy.

4. In terms of fairness, the examination was:

1. Very unfair.
2. Unfair.
3. Fair.

5. In terms of relevance to this occupation, the material covered on the examination was:

1. Totally irrelevant.
2. Irrelevant.
3. Relevant.
4. Very relevant.

6. To what extent does this examination reflect the day-to-day activities of this occupation?

1. Very poorly.
2. Poorly.
3. About right.
4. Well.
5. Very well.

7. To what extent is the knowledge covered in this examination necessary to the day-to-day work in this occupation?

1. Totally unnecessary.
2. Unnecessary.
3. Some is necessary, some is unnecessary.
4. Necessary.
5. Totally necessary.

8. To evaluate me in this occupation, I would prefer:

1. Only a written examination.
2. Only my supervisor to evaluate me.
3. Both a written exam and my supervisor to evaluate me.
4. Another type of exam, such as essay or short answer. Specify:

   _____

5. No evaluation at all.

Number of years of experience _____

Please feel free to include any comments on the back of this sheet. In the past, our examinees' comments have been of tremendous help to us. Thank you very much for your participation.

ATTACHMENT A-2

TELEPHONE SURVEY FOR FIELD TEST CANDIDATES

Candidate's Name: _____

Phone Number: _____ *Occupation:* *Province:*

Hello, this is _____ calling on behalf of ATEC/MTEC/PRIT/STEC. We are conducting an evaluation of the certification process for FBS/LTG which you are presently in. Your comments about your experiences will assist us in improving this process. I have a few questions which will only take a few minutes of your time. Your responses will be kept confidential. Is this a good time to talk to you?

If no, when could I call you back?

1. What stage of the certification process are you currently in?

   Performance Checklist ( )(a) *Industry Evaluation ( )(b)* *Completing Prerequisites ( )(b)*
   Waiting for Certificate ( )(b)

2. Since you began the certification process, we have mailed you some packages of information. How well has this information answered your questions about the certification process?

   Very Well ( ) *Well ( )* *Not very well ( )* *Very poorly ( )* *Undecided ( )*

   If negative, prompt for specific problems and documents.

3. Do you have any comments or suggestions about the information you have received?

4. Recently, you wrote an exam for FBS/LTG. How well did this exam test your knowledge of the occupation?

   Very Well ( ) *Well ( )* *Not very well ( )* *Very poorly ( )* *Undecided ( )*

   If negative, ask why.

5. Do you have any comments or suggestions about the written examination?

6. a) You are currently working on the Performance Checklist/Review. Do you have any comments or suggestions about the checklist/review?
   b) You have recently completed the Performance Checklist/Review. Do you have any comments or suggestions about the checklist/review?

   Prompt following both negative and positive responses...

Thank you for answering these questions. We are hoping to follow up this interview with a written survey which we will be mailing to you in a few days. This survey will only take a few minutes of your time and will provide us with more detailed information about the certification process. If you have any questions or additional comments, please don't hesitate to call our office. Your participation and responses are essential to the improvement of the certification process. Thanks again for your time.

ATTACHMENT A-3
WRITTEN QUESTIONNAIRE MAILED TO CANDIDATES

1~
2~
3~
4~

Dear 5~,

Thank you for your comments during our recent telephone conversation. As promised, I have enclosed a two-page questionnaire which I would like you to complete. This questionnaire will give you an opportunity to provide us with more specific feedback about the certification process for Food and Beverage Server/Local Tour Guide. Improvements to the certification process will be based upon your suggestions and comments.

Please return the questionnaire in the enclosed postage-paid envelope, or, if you find it more convenient, by fax at (403) 422-3069. We will be compiling the results on _____, so please ensure your responses are received by then.

If you have any concerns about the questionnaire, I would be pleased to hear from you at (403) 427-6701. Other certification questions can be directed to _____ (ATEC/MTEC/PRIT/STEC) at (###) ###-####. Your comments will help us improve the certification process. Thank you for your time and commitment to the evaluation of the certification process for Food and Beverage Server/Local Tour Guide.

Sincerely,

Teri Sunde

enclosures

ATEC Certification Questionnaire

INSTRUCTIONS

Please answer the following questions. Circle the response which best indicates your opinion. If there is not enough room for your comments, or you would like to provide us with additional feedback, please write the information on a separate sheet and return it with the survey.

SA = Strongly Agree	A = Agree D = Disagree
SD = Strongly Disagree	NA = No Opinion or Not applicable

Documentation and Correspondence

1.	I received enough information to understand the certification process.	SA	A	D	SD	NA
2.	There was a time in the process when I did not know what I was expected to do.	SA	A	D	SD	NA
3.	When I had a question about the process, I was able to determine the answer from the written material provided.	SA	A	D	SD	NA
4.	My enquiries to ATEC were answered completely.	SA	A	D	SD	NA
5.	My enquiries to ATEC were responded to promptly.	SA	A	D	SD	NA

Please use this space to provide us with any further comments that you may have on **documentation and correspondence.**

Written Examination

6.	The examination information package clearly indicated the day on which the examination was to be written.	SA	A	D	SD	NA
7.	The examination information package clearly indicated where the examination was to be written.	SA	A	D	SD	NA
8.	I thought the sample test questions provided in the examination information package were helpful.	SA	A	D	SD	NA
9.	The instructions at the beginning of the written examination were clear.	SA	A	D	SD	NA
10.	The individual supervising the written examination provided adequate direction.	SA	A	D	SD	NA
11.	I understood the breakdown of my examination results.	SA	A	D	SD	NA
12.	I received adequate detail in the breakdown of my examination score.	SA	A	D	SD	NA

13. How many hours did you study the standards in preparation for the written examination? _____ hours.
    Was this: (please check (✓) one)
    ___ About the amount of time you expected?
    ___ More time than you expected?
    ___ Less time than you expected?

Please use this space to provide us with any further comments which you may have on the **written examination.**

Continued on reverse

#132

Performance Checklist

14.	I think that the performance checklist helped me master the skills outlined in the standards.	SA	A	D	SD	NA
15.	My supervisor should have to sign off each skill as I master it.	SA	A	D	SD	NA
16.	My supervisor should have to sign only the signatory page of my checklist.	SA	A	D	SD	NA
17.	I feel that I would benefit from having my supervisor involved while I complete the checklist.	SA	A	D	SD	NA
18.	I thought the instructions at the beginning of the checklist were clear.	SA	A	D	SD	NA
19.	I think the performance checklist helped me to identify skills I needed to improve.	SA	A	D	SD	NA
20.	I would prefer to receive the checklist before writing the written examination.	SA	A	D	SD	NA
21.	The physical layout made the checklist easy to understand.	SA	A	D	SD	NA
22.	I needed more time to complete the performance checklist.	SA	A	D	SD	NA

23. Were there any aspects of the performance checklist which you had difficulty with? _____ Yes _____ No

If yes, a) Were you able to obtain the necessary assistance from your supervisor? _____ Yes _____No

b) What was the problem with the checklist?

_____

_____

24. How many hours did it take you to complete the performance checklist? _____ total hours.
Was this: (please check (✓) one)
___ About the amount of time you expected?
___ More time than you expected?
___ Less time than you expected?

25. How many hours would you estimate that you and your supervisor worked together while completing the performance checklist? _____ total hours.
Was this: (please check (✓) one)
___ About the amount of time you expected?
___ More time than you expected?
___ Less time than you expected?

Please use this space to provide us with any further comments which you may have on the **performance checklist.**

_____

_____

Thank you for the time you spent completing this survey. If there are other issues or concerns you would like to bring to our attention please write them in the space below. If you wish, you can also phone us at (403)-427-6701.

Please return the completed survey in the postage paid envelope provided, or fax it to us.

Tourism Standards Consortium
Attn: Teri Sunde
1702, 10405 - Jasper Avenue
Edmonton, Alberta
T5J 3N4
Fax: (403) 422-3069

_____

_____

_____

_____

Performance Checklist

14. I think that the performance checklist helped me master the skills outlined in the standards. SA A D SD NA

15. I think the performance checklist helped me to identify skills I needed to improve. SA A D SD NA

16. I think the performance checklist is useful as a training tool. SA A D SD NA

17. I think the peformance checklist is useful as an evaluation tool. SA A D SD NA

18. The instructions at the beginning of the performance checklist are clear. SA A D SD NA

19. I would prefer to receive the checklist before writing the written examination. SA A D SD NA

20. The physical layout makes the checklist easy to understand. SA A D SD NA

21. I think it is most beneficial if: (please check (✓) one)
    _____ my supervisor signs off each skill as I master it.
    _____ my supervisor signs only the signatory page of the checklist.
    _____ my supervisor signs off each category as I master the skills in that category.

22. Were there any aspects of the performance checklist which you had difficulty with? _____ Yes _____ No

    If yes, a) Were you able to obtain the necessary assistance from your supervisor? _____ Yes _____No

    b) What was the problem with the checklist?

    _____

    _____

23. How many hours did it take you to complete the performance checklist? _____ total hours.
    Was this: (please check (✓) one)
    ___ About the amount of time you expected?
    ___ More time than you expected?
    ___ Less time than you expected?

24. How many hours would you estimate that you and your supervisor worked together while completing the performance checklist?_____ total hours.
    Was this: (please check (✓) one)
    ___ About the amount of time you expected?
    ___ More time than you expected?
    ___ Less time than you expected?

25. How did you benefit from having your supervisor involved in the performance checklist?

_____

_____

_____

Please use this space to provide us with any further comments which you may have on the **performance checklist.**

_____

_____

_____

Thank you for the time you spent completing this confidential survey. If there are other issues or concerns you would like to bring to our attention please write them on an additional sheet of paper. If you wish, you can also phone us at (403)-427-6701.

Please return the completed survey in the postage paid envelope provided, or fax it to us.

Tourism Standards Consortium
Attn: Teri Sunde
1702, 10405 - Jasper Avenue
Edmonton, Alberta
T5J 3N4
Fax (604) 688-2554

ATTACHMENT A-4

FOCUS GROUP QUESTIONS

1. **What are your perceptions of the industry evaluation?**
   - how did the evaluation work?
   - do you think the evaluation was a true reflection of your day-to-day performance (natural vs. contrived)?
   - did you know who the evaluator was?
     - if yes, how did you find out?
     - were you nervous? -- how could this be alleviated?
   - did you feel prepared for the evaluation?
     - were you nervous? was that a barrier to doing well?
   - how do you feel about evaluator (professionalism, competence, objectivity)?
   - what feedback would you like from the evaluation?
   - perceptions of the interview (if conducted)
   - is this step necessary?
     - suggested alternatives for objectively evaluating candidate's performance

2. **We lose some candidates in the performance checklist stage.**
   What suggestions do you have to encourage candidates to complete the process? (for the candidate, the supervisor, ATEC)
   - how did you complete the performance checklist (e.g. study group, individual, practice skills, during work...)?
     - should this stage be more structured?
     - should there be a formal training/education program offered? (maybe choice between self or course?)
   - is the performance checklist useful as a training tool, as an evaluation tool?
   - did "house policy" create difficulties in completing the performance checklist and passing the evaluation?

3. **What role should supervisors play in the certification process?** (advisory, hands on, training, evaluation)
   - some supervisors have indicated that they prefer to be actively involved with the candidate through the entire process (particularly the performance checklist stage); other supervisors have indicated that they prefer to let the candidate work through the process individually (with minimal guidance from the supervisor) -- from your experience in the process, which would you recommend and why?
   - what should supervisors be asked to complete (if anything)? (sign every skill, signatory page OR summary page)
   - for those who worked with a supervisor:
     - what was the biggest challenge of working with your supervisor?
     - how did you benefit from working with your supervisor?
   - for those who did not work with a supervisor:
     - what was the biggest challenge of working without a supervisor?
     - how did you benefit from working without a supervisor?
   - which would you prefer (with or without supervisor)?
   - perceived differences between the occupations?

4. **Perceptions of becoming certified**
   - what changes have you perceived since becoming certified?
     - gratuities/wages increased?
     - self-esteem?
     - recognition by supervisor and/or work colleagues, community
   - what form of recognition is most important to you? (certificate, pin, other)

5. **Overall satisfaction with certification process**
   - how could certification be improved (need specific suggestions)
   - three steps of process (order, number of steps)
   - length of time in process (too long/too short)
   - to what extent did certification process meet your expectations?
   - would you have considered certification if you had not been involved in the field test group?
   - how much would you be willing to pay for certification? (& who should pay?)
   - would you recommend certification to others?
   - do you think certification should be mandatory for your occupation?
   - what are your perceptions of the challenge model (self-directed)?
     - should there be more structure to the process, a formal training/education program component?

Thank you very much for taking time to meet with us today and to provide us with your feedback. We will be using this information to make improvements to the certification process. If you think of any other comments/suggestions, please contact me at 427-6701. Thanks!

ATTACHMENT A-5

Telephone Interviews with Certified Candidates

Candidate's Name: _____ Phone #: _____ Date:_____

Hello, this is Kate calling on behalf of MTEC/STEC/PRIT. We are following up with our certified Food & Beverage Servers/Local Tour Guides, and would like to ask you a few questions about your experiences. Your feedback will assist us in improving the certification process. Is this a good time to ask you a few questions? If no, when can I call back?

1. Did you feel prepared for the industry evaluation? Yes ( ) No ( ) Comments (why or why not?):

2. Do you think the evaluation was a true reflection of your day-to-day performance? (natural vs. contrived) Yes ( ) No ( ) Comments:

3. a. Did you know who the evaluator was? Yes ( ) No ( ) Comments:
   b. Would you prefer to know the identity of the evaluator? Yes ( ) No ( ) Comments:

4. How did you feel about the evaluator? (professionalism, competence, objectivity)

5. a. Was an interview conducted after your evaluation? Yes ( ) No ( )
   b. What were your perceptions of this interview?

6. Do you think the evaluation is necessary for certification? Yes ( ) No ( ) Comments:

7. How did you complete the performance checklist? (e.g. study group, individual, practice skills, during work...)

8. Should this step be more structured? Yes ( ) No ( ) Comments:

9. Is the performance checklist useful as a training tool, an evaluation tool, or both? Comments:

10. What challenges did you have with "house policies" being different from the standards?

11. a. Did your supervisor assist you in completing the certification process? Yes ( ) No ( )
    b. If yes, how? (Go to #12) If no, why not? (Go to #13)

12. (for those who worked with supervisor) a. How did you benefit from working with your supervisor?
    b. What was the biggest challenge of working with your supervisor? (Go to #16)

13. (for those who did NOT work with supervisor) a. How did you benefit from working without a supervisor?
    b. What was the biggest challenge of working without a supervisor?

14. What level of involvement do you think supervisors should have in the certification process?

15. What should supervisors be asked to complete?
    _____ every skill
    _____ signatory page
    _____ summary page with major categories of skills
    _____ nothing
    Comments (pros/cons of any of the above):

16. What changes have you perceived since becoming certified?
(gratuities/wages increased, self-esteem, recognition by supervisor and/or work colleagues, community)

17. What form of recognition is most important to you? (certificate, pin, other?)

18. Would you have considered certification if you had not been involved in the field test group?
Yes ( ) No ( ) Comments:

19. Would you recommend certification to others? Yes ( ) No ( ) Comments (why or why not?):

20. Do you have any other comments or suggestions about the certification process?

Thank you very much for taking time to talk with me today and provide us with your feedback. We will be using this information to make improvements to the certification process.

ATTACHMENT A-6

PHONE INTERVIEW - INVIGILATORS

Name _____ Phone number _____ Date _____

Hello, this is _____ calling on behalf of ATEC/PRIT/STEC/MTEC. We are currently evaluating the certification process for Food & Beverage Server and Local Tour Guide. Because you have been involved in our certification process, we would like to hear your comments about your experiences as an invigilator. Your feedback will assist us in improving the certification process. I have a few questions which will only take about five minutes of your time. Your responses will be kept confidential. Is this a good time to talk to you? *If no,* when could I call you back?

1. You recently invigilated a certification examination for ATEC/PRIT/STEC/MTEC. Which occupations were the candidates writing?
   FBS ( ) LTG ( ) Don't know ( ) Other ( )

2. How well did the information you received from ATEC/PRIT/STEC/MTEC prepare you to invigilate this examination?
   Very well ( ) Well ( ) Not very well ( ) Very poorly ( ) Undecided ( )
   If negative, how could this information be improved?

3. If you had any questions in advance, did ATEC/PRIT/STEC/MTEC office answer these questions promptly?
   Yes ( ) No ( ) If no, please explain/provide details?

4. Were all arrangements made well enough in advance? *Yes ( ) No ( )*
   If no, what problems did you encounter and how could they be avoided?

5. How adequate was the facility for the candidates writing the examination?
   Very adequate ( ) Adequate ( ) Not adequate ( ) Very poor ( ) Undecided ( )
   If negative, please explain.

6. Did you review the instructions with the candidates prior to writing the exam? *Yes ( ) No ( )*

7. Do you think the candidates had clear instructions for writing the exam? *Yes ( ) No ( )*

8. Were you asked any questions by the candidates? *Yes ( ) No ( )*
   If yes, what kinds of questions?

   Could you readily answer these questions? *Yes ( ) No ( ) If no,* why not?

9. Would you be willing to invigilate another certification examination for ATEC/PRIT/STEC/MTEC? *Yes ( ) No ( )*
   If no, why not?

10. Do you have any other comments or suggestions about the examination?

Thank you for answering these questions for me. Your participation is essential to the improvement of the certification process. Thanks again for your time.

ATTACHMENT A-7
TELEPHONE INTERVIEW - SUPERVISORS

Name _____ Phone number _____ Date_____

Hello, this is Teri calling on behalf of ATEC/MTEC/STEC/PRIT. We are currently evaluating the certification process for Food & Beverage Server/Local Tour Guide. Because you have been involved in our certification process as a supervisor, we would like to hear your comments. I have a few questions which will only take about five minutes of your time. Your responses will be kept confidential. Is this a good time to talk to you? If no, when could I call you back?

1. How many of your employees are involved in the certification process? _____

2.a. How well has the information you have received from ATEC explained your role in the certification process?
Very well ( ) Well ( ) Not very well ( ) Very poorly ( ) Undecided ( )
b. How could the information be improved?

3.a. Did you ever need to contact ATEC directly to clarify an issue or concern? Yes ( ) No ( )
b. How well did ATEC respond to your questions? Very well ( ) Well ( ) Not very well ( ) Very poorly ( ) Undecided ( )
c. If negative, prompt for problem.

4.a. Are you familiar with the standards upon which the certification process is based? Yes ( ) No ( )
b. If yes, What are your perceptions about the quality of the standards?

5.a. Would you prefer to receive your own copy of the standards? Yes ( ) No ( ) b. Why/why not?

6.a. Are you familiar with the performance checklist that your employee(s) in the certification process worked through? Yes( ) No( )
If no, go to question #12.
b. If yes, what assistance have you provided to each employee?

7. How many hours would you estimate that you and each employee(s) worked together while completing the performance checklist?

8.a. Was this the amount of time you expected? Yes ( ) No ( )
b. If no, how long did you expect it to take? (More OR less than actual)

9.a. How did you use the performance checklist:
_____ training tool
_____ evaluation tool
_____ both
b. If training, how? (based on performance checklist or standards)
c. If evaluation, how?

10. Which of the following alternatives would you prefer to complete for the candidates and why:
_____ signing the signatory page only
_____ signing each skill in the checklist
_____ completing a summary with major categories of skills

11. Do you have any other comments or suggestions about the performance checklist?

12.a. Were you aware that one (or more) of your employees was recently evaluated? Yes ( ) No ( )
b. If yes, what are your perceptions of this industry evaluation?

13. What role do you think supervisors should have in the certification process?

14.a. Will you be encouraging other employees to apply for ATEC certification? Yes ( ) No ( )
b. If no, why not?

15. What is your overall perception about the certification process?

Thank you for answering these questions for me. If you have any other questions or comments, please don't hesitate to call me at the ATEC office. Your participation is essential to the improvement of the certification process. Thanks again for your time.

ts c:\work\fte\suprvsr.d2 032393

ATTACHMENT A-8

TELEPHONE INTERVIEW - EVALUATORS

Name _____ Phone number _____ Date_____

Hello, this is _____ calling on behalf of ATEC/MTEC/STEC/PRIT. We are currently evaluating the certification process for Food & Beverage Server/Local Tour Guide. Because you have been involved in this certification process, we would like to hear your comments about your experiences as an evaluator. Your feedback will assist us in improving the certification process. I have a few questions which will only take about five minutes of your time. Is this a good time to ask you a few questions? If no, when could I call you back?

1. How many certification candidates have you evaluated? _____ If only one, go to #3.

2. Does the evaluation form require you to evaluate the candidates in a consistent manner? Yes ( ) No ( )
   If no, what suggestions do you have for revising the evaluation form?

3. You have recently been trained as an evaluator for Food and Beverage Server/Local Tour Guide candidates. How well did this training prepare you for the evaluation(s) you conducted?
   Very well ( ) Well ( ) Not very well ( ) Very poorly ( ) Undecided ( )
   How could this training be improved?

4. Does the evaluation form allow for subjectivity? Yes ( ) No ( )
   Should the evaluation be more or less subjective? More ( ) Less ( ) Why?

5. Do you think the evaluation accurately reflects the occupation? Yes ( ) No ( )
   Do you think the evaluation is a fair test of the candidate's skills? Yes ( ) No ( )
   If one yes and one no, How could the evaluation be improved?

6. Was the evaluation "Incognito"? Yes ( ) No ( )
   Do you think the evaluation should be incognito? Yes ( ) No ( ) Why?

7. Did you have any problems carrying out the evaluation? Yes ( ) No ( )
   If yes, what? _____

8. Is there any part of the evaluation that you feel is unnecessary? Yes ( ) No ( )
   If yes, what?

9. Is there any part of the evaluation that you are uncomfortable with? Yes ( ) No ( )
   If yes, what?

10. Did you interview the candidate after the evaluation to clarify actions? Yes ( ) No ( )

11. Do you have any other comments or suggestions about the industry evaluation?

Thank you for answering these questions for me. If you have any other questions or comments, please don't hesitate to call the ATEC office. Your participation is essential to the improvement of the certification process. Thanks again for your time.

ATTACHMENT B
TIMELINE FOR FORMATIVE EVALUATION

Summer 1992	• Planned preliminary schedule • Developed overall goal and objectives
September 1992	• Drafted and revised surveys
October 1992	• Telephoned candidates in Alberta • Mailed questionnaires to candidates in Alberta
November 1992	• Telephoned invigilators in Alberta • Telephoned Alberta Hotel Association (recruiting organization)
December 1992	• Telephoned both Food & Beverage Server and Local Tour Guide candidates in British Columbia and Manitoba • Telephoned Local Tour Guide candidates in Saskatchewan • Mailed questionnaires to candidates who completed telephone survey
January 1993	• Telephoned Food & Beverage Server candidates in Saskatchewan • Telephoned candidates in Manitoba and British Columbia who were not interviewed in December • Mailed questionnaires to candidates who completed telephone survey • Telephoned invigilators in British Columbia, Saskatchewan and Manitoba
February 1993	• Followed up with provincial co-ordinators concerning candidates who would not complete the certification process • Telephoned candidates who had rewritten the examination and passed • Mailed questionnaires to candidates who had rewritten examination and passed
March 1993	• Interviewed supervisors of certified candidates • Followed up with provincial co-ordinators concerning candidates who had not completed the certification process • Extended completion of field test evaluation until end of summer
April 1993	• Interviewed supervisors of certified candidates • Prepared interim report
May 1993	• Conducted focus groups with certified candidates in Alberta
July 1993	• Followed up with provincial co-ordinators concerning candidates who had not completed certification
August 1993	• Interviewed supervisors and evaluators • Interviewed provincial co-ordinators and certification assistants
September 1993	• Conducted follow-up telephone interviews with certified candidates in British Columbia, Manitoba and Saskatchewan
October 1993	• Prepared and distributed final report

ATTACHMENT C
RESULTS OF CANDIDATE SURVEYS

The candidates were considered the most important source of feedback about the certification process. Their comments and opinions were solicited through several different surveys. The results of the candidate surveys are presented in the following tables in Attachment C. The frequencies of the responses are presented, unless stated otherwise. Options with no respondents have not been included in the tables.

CANDIDATE RESPONSE RATES

	TOTAL REGISTERED	PASSED EXAM	TELEPHONE SURVEY	WRITTEN QUESTIONNAIRE	FOCUS GROUP/ FOLLOW-UP INTERVIEW
AB-FBS	23	18	12	13	4
AB-LTG	17	17	12	11	9
BC-FBS	24	19	15	6	10
BC-LTG	31	30	26	20	6
MB-FBS	42	39	31	10	4
MB-LTG	10	9	7	5	1
SK-FBS	47	46	36	13	16
SK-LTG	4	4	3	3	0
TOTAL FBS	136	122	94	42	34
TOTAL LTG	62	60	48	39	16
TOTAL	198	182	142	81	50

ATTACHMENT C-1
EXAMINEES' QUESTIONNAIRE

Of the 198 candidates who wrote the exam, there were 154 usable Examinees' Questionnaires. The responses to the questions listed at the end of every exam are presented in the following tables.

EQ1. What is your opinion about the amount of time allotted for this examination?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Far too little time	2	0	0	0	2	0	2
Too little time	1	1	0	0	1	1	2
About the correct amount of time	14	28	14	18	43	31	74
Time to spare	7	10	21	23	49	12	61
Much time to spare	2	1	6	6	15	0	15
Total	26	40	41	47	110	44	154

EQ2. The wording on the test items was:

	AB	BC	MB	SK	FBS	LTG	TOTAL
Poor	0	1	0	1	2	0	2
Confusing	6	10	1	5	8	14	22
Awkward	1	4	3	8	15	1	16
Clear	17	19	31	28	75	20	95
Very clear	1	0	6	4	10	1	11
Total	25	34	41	46	110	36	146

EQ3. In terms of difficulty, the examination was:

	AB	BC	MB	SK	FBS	LTG	TOTAL
Difficult	2	4	5	4	11	4	15
About right	23	27	33	41	88	36	124
Easy	1	6	3	2	11	1	12
Total	26	37	41	47	110	41	151

EQ4. In terms of fairness, the examination was:

	AB	BC	MB	SK	FBS	LTG	TOTAL
Unfair	1	2	1	3	6	1	7
Fair	25	36	40	43	103	41	144
Total	26	38	41	46	109	42	151

EQ5. In terms of relevance to the Food & Beverage Server/Local Tour Guide occupation, the material covered on the exam was:

	AB	BC	MB	SK	FBS	LTG	TOTAL
Irrelevant	0	2	0	0	1	1	2
Relevant	19	29	27	32	74	33	107
Very relevant	7	9	14	15	35	10	45
Total	26	40	41	47	110	44	154

EQ6. To what extent does this examination reflect the day-to-day activities of a Food & Beverage Server/Local Tour Guide?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Poorly	0	1	1	1	3	0	2
About right	11	18	18	15	40	22	62
Well	15	21	22	31	67	22	89
Total	26	40	41	47	110	44	154

EQ7. To what extent is the knowledge covered in this examination necessary to the day-to-day work of a Food & Beverage Server/Local Tour Guide?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Totally unnecessary	1	0	0	0	1	0	1
Some is necessary, some is unnecessary	10	15	14	14	38	15	53
Necessary	10	16	18	21	46	19	65
Totally necessary	5	9	9	12	25	10	35
Total	26	40	41	47	110	44	154

EQ8. To evaluate me as a Food & Beverage Server/Local Tour Guide, I would prefer:

	AB	BC	MB	SK	FBS	LTG	TOTAL
Only a written examination	5	5	2	8	14	6	20
Only my supervisor to evaluate me	0	2	5	2	8	1	9
Both a written exam and my supervisor to evaluate me	18	27	29	32	76	30	106
Another type of exam, such as essay or short answer	2	4	2	3	6	5	11
No evaluation at all	0	0	1	1	2	0	2
Total	25	38	39	46	106	42	148

ATTACHMENT C-2
CANDIDATE TELEPHONE SURVEY

The following tables present the responses to the telephone interviews with the candidates, categorized by province and occupation. 142 telephone interviews were completed by candidates who passed the written exam. Of the 182 candidates who passed the exam, 38 were not interviewed by telephone.

TS2. Since you began the certification process, we have mailed you some packages of information. How well has this information answered your questions about the certification process?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Well	22	37	37	34	87	43	130
Not very well	0	2	0	0	0	2	2
Undecided	2	2	1	5	7	3	10
Total	24	41	38	39	94	48	142

TS4. Recently, you wrote an exam for Food & Beverage Server/Local Tour Guide. How well did this exam test your knowledge of the occupation?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Well	22	33	36	33	86	38	124
Not very well	0	7	0	3	1	9	10
Undecided	2	1	2	3	7	1	8
Total	24	41	38	39	94	48	142

ATTACHMENT C-3
WRITTEN QUESTIONNAIRE - PAGE 1

The following tables present the frequency of responses to the statements on the written questionnaire, segmented by province and by occupation. Of the 182 candidates who passed the written exam, 81 completed and returned the mailed questionnaire.

WQ1. I received enough information to understand the certification process.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	23	24	14	115	39	37	76
Disagree	0	2	1	1	2	2	4
No opinion/Not applicable	1	0	0	0	1	0	1
Total	24	26	15	16	42	39	81

WQ2. There was a time in the process when I did not know what I was expected to do.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Disagree	15	16	12	11	29	25	54
Agree	8	10	3	5	12	14	26
No opinion/Not applicable	1	0	0	0	1	0	1
Total	24	26	15	16	42	39	81

WQ3. When I had a question about the process, I was able to determine the answer from the written material provided.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	20	23	14	15	40	32	72
Disagree	4	3	1	1	2	7	9
Total	24	26	15	16	42	39	81

WQ4. My enquiries to the provincial TSC office were answered completely.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	18	21	13	16	36	32	68
Disagree	3	1	0	0	0	4	4
No opinion/Not applicable	3	4	2	0	6	3	9
Total	24	26	15	16	42	39	81

WQ5. My enquiries to the provincial TSC office were responded to promptly.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	20	19	12	15	35	31	66
Disagree	3	3	1	1	3	5	8
No opinion/Not applicable	1	4	2	0	4	3	7
Total	24	26	15	16	42	39	81

WQ6. The examination information package clearly indicated the day on which the examination was to be written.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	23	24	14	14	38	37	75
Disagree	0	2	0	1	1	2	3
No opinion/Not applicable	1	0	1	1	3	0	3
Total	24	26	15	16	42	39	81

WQ7. The examination information package clearly indicated where the examination was to be written.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	20	24	14	14	37	35	72
Disagree	3	2	0	1	2	4	6
No opinion/Not applicable	1	0	1	1	3	0	3
Total	24	26	15	16	42	39	81

WQ8. I thought the sample test questions provided in the examination information package were helpful.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	23	22	12	15	38	34	72
Disagree	1	3	3	0	3	4	7
No opinion/Not applicable	0	1	0	1	1	1	2
Total	24	26	15	16	42	39	81

WQ9. The instructions at the beginning of the written examination were clear.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	23	22	15	16	42	34	76
Disagree	1	3	0	0	0	4	4
No opinion/Not applicable	0	1	0	0	0	1	1
Total	24	26	15	16	42	39	81

WQ10. The individual supervising the written examination provided adequate direction.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	21	22	14	14	38	33	71
Disagree	3	3	1	1	2	6	8
No opinion/Not applicable	0	1	0	1	2	0	2
Total	24	26	15	16	42	39	81

WQ11. I understood the breakdown of my exam results.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	24	22	15	16	41	36	77
Disagree	0	2	0	0	0	2	2
No opinion/Not applicable	0	2	0	0	1	1	2
Total	24	26	15	16	42	39	81

WQ12. I received adequate detail in the breakdown of my examination score.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	20	20	13	14	36	31	67
Disagree	3	5	0	1	3	6	9
No opinion/Not applicable	1	1	2	1	3	2	5
Total	24	26	15	16	42	39	81

WQ13.a. How many hours did you study the standards in preparation for the written examination?

AVERAGE BY PROVINCE & OCCUPATION	AB	BC	MB	SK	FBS	LTG	TOTAL
Hours studied for exam	7.6	10.2	11.3	8.7	8.4	10.2	9.2
Number of cases	23	20	12	13	37	31	68

WQ13.b. Was this:

	AB	BC	MB	SK	FBS	LTG	TOTAL
About the amount of time you expected?	15	14	8	10	25	22	47
More time than you expected?	2	5	4	1	6	6	12
Less time than you expected?	6	1	2	3	7	5	12
Total	23	20	14	14	38	33	71

WQ13.a. How many hours did you study the standards in preparation for the written examination?

Hours Studying	Frequency	Valid Percent	Cumulative Percent
0	4	5.88	5.88
1	5	7.35	13.23
2	6	8.82	22.05
3	10	14.71	36.76
4	8	11.76	48.52
5	5	7.35	55.87
6	5	7.35	63.22
8	4	5.88	69.10
10	8	11.76	80.86
12	1	1.47	82.33
15	2	2.94	85.27
20	5	7.35	92.62
24	1	1.47	94.09
30	2	2.94	97.03
75	1	1.47	98.50
80	1	1.47	99.97
Total	**68**	**100.00**	

ATTACHMENT C-3
WRITTEN QUESTIONNAIRE - PAGE 2

55 candidates from Alberta, Manitoba and Saskatchewan completed Form A; 26 candidates from British Columbia completed Form B. Many of the questions were the same on both forms and the responses for these questions have been combined.

WQA14 & B14. I think that the performance checklist helped me master the skills outlined in the standards.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	19	15	15	15	36	28	64
Disagree	3	5	0	1	2	7	9
No opinion/Not applicable	2	6	0	0	4	4	8
Total	24	26	15	16	42	39	81

WQA15. My supervisor should have to sign off each skill as I master it.

	AB	MB	SK	FBS	LTG	TOTAL
Agree	13	6	9	18	10	28
Disagree	8	7	6	14	7	21
No opinion/Not applicable	3	2	1	4	2	6
Total	24	15	16	36	19	55

WQA16. My supervisor should have to sign only the signatory page of my checklist.

	AB	MB	SK	FBS	LTG	TOTAL
Agree	7	10	6	17	6	23
Disagree	14	3	8	16	9	25
No opinion/Not applicable	3	2	2	3	4	7
Total	24	15	16	36	19	55

WQA17. I feel that I would benefit from having my supervisor involved while I complete the checklist/review.

	AB	MB	SK	FBS	LTG	TOTAL
Agree	17	9	11	24	13	37
Disagree	5	3	4	8	4	12
No opinion/Not applicable	2	3	1	4	2	6
Total	24	15	16	36	19	55

WQB16. I think the performance checklist is useful as a training tool. (BC only)

	FBS	LTG	TOTAL - BC
Agree	4	17	21
Disagree	1	1	2
No opinion/Not applicable	1	2	3
Total	6	20	26

WQB17. I think the performance checklist is useful as an evaluation tool. (BC only)

	FBS	LTG	TOTAL - BC
Agree	5	17	22
Disagree	0	1	1
No opinion/Not applicable	1	2	3
Total	6	20	26

WQA18 & B18. I thought the instructions at the beginning of the checklist were clear.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	22	19	12	15	35	33	68
Disagree	1	4	2	0	3	4	7
No opinion/Not applicable	1	3	1	1	4	2	6
Total	24	26	15	16	42	39	81

WQA19 & B15. I think the performance checklist/review helped me to identify skills I needed to improve.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	19	19	13	13	36	28	64
Disagree	4	2	0	1	1	6	7
No opinion/Not applicable	1	5	2	2	5	5	10
Total	24	26	15	16	42	39	81

WQA20 & B19. I would prefer to receive the checklist before writing the written examination.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	12	14	4	6	14	22	36
Disagree	9	4	7	8	21	7	28
No opinion/Not applicable	3	8	4	2	7	10	17
Total	24	26	15	16	42	39	81

WQA21 & B20. The physical layout made the checklist/review easy to understand.

	AB	BC	MB	SK	FBS	LTG	TOTAL
Agree	22	21	14	14	36	35	71
Disagree	1	2	0	0	1	2	3
No opinion/Not applicable	1	3	1	2	5	2	7
Total	24	26	15	16	42	39	81

WQA22. I needed more time to complete the performance checklist/review.

	AB	MB	SK	FBS	LTG	TOTAL
Agree	3	3	3	6	3	9
Disagree	17	9	9	21	14	35
No opinion/Not applicable	4	3	4	9	2	11
Total	24	15	16	36	19	55

WQB21. I think it is most beneficial if: (BC only)

	FBS	LTG	TOTAL - BC
My supervisor signs off each skill as I master it.	0	1	1
My supervisor signs only the signatory page of the checklist.	1	6	7
My supervisor signs off each category as I master the skills in that category.	3	7	10
Total	4	14	18

WQA23 & B22. Were there any aspects of the performance checklist/review which you had difficulty with?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Yes	4	5	2	6	9	8	17
No	18	18	10	8	26	28	54
Total	22	23	12	14	35	36	71

a) Were you able to obtain the necessary assistance from your supervisor?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Yes	0	3	0	3	2	4	6
No	2	2	2	1	4	3	7
Total	2	5	2	4	6	7	13

b) What was the problem with the checklist/review?

skills not relevant, e.g. p.o.s, serving bottles of wine (6)
supervisor too busy (3)
deciding dates for each area of review; completing checklist
format should be simpler; too many questions on basic skills
should be completed with supervisor
should try to make things more subjective than objective
some of the questions were ambiguous and confusing
some skills differ from house policy
unsure what expectations were due to present duties
wording was difficult to relate to subject matter

WQA24 & B23.a. How many hours did it take you to complete the performance checklist/review?

MEAN BY PROVINCE & OCCUPATION	AB	BC	MB	SK	FBS	LTG	TOTAL
Average hours to complete performance checklist/review	22.4	8.7	10.0	11.5	18.5	8.5	13.7
Number of cases	14	15	7	11	24	23	47

Hours to Complete	Frequency	Valid Percent	Cumulative Percent
1	6	12.77	12.77
2	10	21.28	34.05
3	4	8.51	42.56
4	3	6.38	48.94
5	2	4.26	53.20
6	6	12.77	65.97
8	2	4.26	70.23
10	3	6.38	76.61
12	1	2.13	78.74
16	2	4.26	83.00
20	3	6.38	89.38
24	1	2.13	91.51
50	1	2.13	93.64
80	2	4.26	97.90
160	1	2.13	100.03
Total	**47**	**100.00**	

WQA24 & B23.b. Was this:

	AB	BC	MB	SK	FBS	LTG	TOTAL
About the amount of time you expected?	12	8	6	7	17	16	33
More time than you expected?	1	6	1	1	5	4	9
Less time than you expected?	2	2	0	3	5	2	7
Total	15	16	7	11	27	22	49

WQA25 & B24.a. How many hours would you estimate that you and your supervisor worked together while completing the performance checklist/review?

Hours with Supervisor	Frequency	Valid Percent	Cumulative Percent
0	16	39.02	39.02
1	11	26.83	65.85
2	3	7.32	73.17
3	5	12.20	85.37
5	2	4.88	90.25
14	1	2.44	92.69
16	1	2.44	95.13
20	1	2.44	97.57
24	1	2.44	100.01
Total who Worked with Supervisor	**25**	**60.98**	
Total Respondents	**41**	**100.00**	

WQA25 & B24.b. Was this:

	AB	MB	SK	FBS	LTG	TOTAL
About the amount of time you expected?	9	3	6	14	4	18
More time than you expected?	0	0	0	0	0	0
Less time than you expected?	3	0	1	2	2	4
Total	12	3	7	16	6	22

B25. How did you benefit from having your supervisor involved in the performance checklist?

Positive
can see the benefit of including a supervisor for new employees
helpful having supervisor involved; objective opinions
learned more info and good tips
positive

Negative
no supervisor involved (6)
too busy for both candidate and supervisor to meet and do checklist

ATTACHMENT C-4
COMMENTS FROM THE CANDIDATES

DOCUMENTATION & CORRESPONDENCE

POSITIVE COMMENTS

clear/straightforward/no surprises (29)
informative/comprehensive (13)
IVC (8)
easy to follow process (7)
great (5)
helpful (4)
concise (2)
good for new guides/servers (2)
timely (2)
well prepared (2)
excited when received letter with results
flexible process
great for those without "education" background
interesting
Maureen has been very helpful
STEC is wonderful
use word of mouth to promote certification
useful to hone skills
well formatted

NEGATIVE COMMENTS

unclear directions for exam
(time allowed, number of questions) (11)
has only received one package (4)
some redundancy of information (2)
too much paper (2)
cost
hasn't read it
had to ask supervisor for assistance/clarification
long time to get through process
need more clearly defined time lines,
e.g. when results will be available
need more overview information
need more time to receive and return information
STEC needs to be better organized
studying with supervisor would be nice
time delay in waiting for certificate from MTEC
unclear directions with checklist
what are the benefits of certification?
what information?

WRITTEN EXAM - POSITIVE COMMENTS

Process:

was involved in standards development as IVC (8)
clearly identifies your strengths and weaknesses (4)
improved skills (3)
studied lots (3)
good to have breakdown of results by category (2)
lots of time allowed (2)
exam and active participation of supervisor at workplace in evaluating candidate's performance will make for a valuable learning experience
overall, it is good
I fully support this program and I am quite proud to be chosen at this time to participate....I found the study material clear and relevant to my "at work" environment.
I feel very good about myself -- now I can give more to whomever I work for and my customers
good to upgrade quality of tour guides
invigilator was great
less study time require because of experience and local knowledge

Content:

comprehensive/thorough (20)
challenging (8)
very easy/clear (4)
well suited to someone new to FBS (4)
fair (3)
not difficult (3)
good exam (2)
lots of basic knowledge, suitable questions (2)
many of the questions were well laid out and required you to know the standards well
I like the "if you were in this position what would you do" questions
good basic information base
test covers most topics studied
excellent
good to have questions on attitude and emergency situations
most questions were straightforward
much better second time
much improved from pilot test
no surprises
not as difficult as expected
really tested knowledge
showed areas of strengths and weaknesses
theoretical background
well planned out

WRITTEN EXAM - NEGATIVE COMMENTS

Process:

needed clearer instructions for exam (time allowed, number of questions, exact location) (17)
needed more time to prepare/study (10)
inadequate details regarding breakdown of exam score; should indicate which questions were answered incorrectly (6)
exam pages were missing (5)
answer sheet is confusing (4)
long time since wrote the exam (3)
delay in receiving exam results (2)
invigilators needed to be better informed (2)
lot of studying needed if not experienced (2)
tested at wrong time of year; too busy (2)
didn't receive test -- had to make photocopy
dreadful for people with experience
fax was illegible
need to ensure awareness that exam is based on standards (bold letters)
need work experience to complement exam
needed more time to read exam
not necessarily learning experience for new FBS
should have 1/2 hour review of legislation and wines before exam
too much time allowed
typing errors and spelling mistakes
as a manager, answers will be different than those of front line person
exam didn't arrive in time
memorized standards since past experience in different area of industry
process handled badly; therefore irritating and cast doubt on whole process
too much time between test and checklist
wrong exam given to candidate

Content:

wording was confusing/ambiguous (69)
similar/repetitive questions (34)
more than one right answer (30)
some questions were not applicable/relevant (17)
house policy (who is right?) (12)
should be fewer questions (9)
should have both written (open-ended) and multiple choice (9)
difficult (8)
some questions were too easy/basic (7)
negative ("not") questions are awkward (5)
tricky questions (5)
should be more people-oriented than knowledge and skills (4)
glass diagrams were black blurs, out of proportion (3)
should be more specific to types of tour guides (3)
should know facts of city (2)
some questions not related to standards (2)
spelling errors (2)
too detailed (2)
few inaccuracies in text (position of wine glass and serving port)
should be stressed that guidelines given must be tailored to the specific style a guest prefers
use of technical names was a little overbearing
using the book that was sent to us for study purposes, I found the exam to be unfair
check English on some
re: #64: resentment can be construed as eventually leading to something positive
where did #64 come from!?
on several occasions, it was presumed the guide was female
categories should be equal, not weighted
could be passed by someone not in occupation
ESL was a problem
mark was lower than expected
not all cut and dried
opinions of exam/standards writers rather than facts
should provide rationale for selecting best answer
some areas not tested very well
some areas not weighted as strongly on exam as in standards
some questions tested how you interpreted the standards
need more tailored questions
should have fewer questions on:
- liquor (5)
- food & food preparation (2)
- carrying trays and service
- point of sales systems
- tipping

should have more questions on:
- guest scenarios(3)
- food knowledge (2)
- handling difficult situations (2)
- emergency situations
- fine dining
- generalized duties for entry-level positions
- labour and other legislation
- other styles of service
- principles
- sanitation
- specifics

PERFORMANCE CHECKLIST/REVIEW - Telephone Interview

POSITIVE COMMENTS

Process:
no difficulties/problems (43)
lots of experience so easy to master all skills (12)
easy to follow/straightforward (11)
great for people just starting (6)
good general process (5)
learned lots (good learning tool) (5)
gives you insight into your performance (3)
practised skills even if not needed at present position (3)
works with supervisor regularly (3)
very good (3)
best with supervisor involvement (2)
will apply background knowledge to training program (2)
if did okay on exam, should do okay on performance review (2)
appropriate
as supervisor, has recommended that everyone be certified
certification provides recognition of person's achievements -- higher quality of service
encourages flexibility and adaptability
good reminder between exam and evaluation
great to have industry input at beginning
great training for establishments with lower serving standards
okay as long as candidate takes it seriously
opportunity to practice skills
should keep reviewing and improving skills
should watch others on-the-job when practising
should work with supervisor to sign off specific skills
studied as group with others
will be using as training tool during ski season
working with one other person and supervisor checks in
working on individually with no problems

Content:
basic knowledge/skills
good checklist
great having emphasis on personal appearance
very thorough

NEGATIVE COMMENTS

Process:
hasn't started yet (9)
is supervisor (7)
difficult to co-ordinate with supervisor (5)
need more/better instructions (5)
supervisor too busy (5)
supervisor not interested (5)
too busy (6)
not working in occupation anymore (4)
still need to go through with supervisor (4)
should have someone besides supervisor (3)
difficult for supervisors to go back and work through checklist (2)
difficult to evaluate self (2)
need for encouragement/follow up from MTEC (2)
waste of paper (2)
waste of time (2)
awkward
confusing without experience
cost
delay between exam and performance review
hasn't received yet
lost in mail
need school for waitressing
need to communicate to industry
no buy-in to process at restaurant
not going to change patterns
not necessary for people with lots of experience
only works part-time
redundant of exam
should do more with school programs
time limit may be more motivating
too long
too boring
worried -- hasn't filled in all blanks

Content:
some skills don't apply (17)
no tour for evaluation (2)
some information is incorrect (2)
too much detail (2)
too picky -- personal appearance is a given (2)
didn't mention 1st aid and CPR in checklist
should include list of who to get help from/resources
some information is unnecessary
too basic

PERFORMANCE CHECKLIST/REVIEW - Written Questionnaire

POSITIVE COMMENTS

analysing own performance over several months, based on PC was a useful activity
covered all areas well
good reminder of areas for improvement
helped be able to do job better
repetitive but ok as that ensures all areas covered
skills mastered or reviewed immediately in some sections; others required over 3 months
things done daily, therefore easy to complete
valuable for someone new to occupation
worked with supervisor on performance review every day for 4 hours
worked with supervisor who was very helpful

NEGATIVE COMMENTS

performance checklist not completed yet (10)
not completed (5) because:
- no supervisor (2)
- supervisor ill
- long distance specific skills and evaluation not covered; time commitment
- job finished

candidate is the supervisor/manager (2)
some skills not relevant (3)
aimed at larger establishments
can't remember amount of time; long time between exam/checklist and this questionnaire
checklist didn't help or hinder in mastering the skills
checklist needs to be shorter; include only most important areas
difficult to calculate time required to complete; 8 hrs/day for 3 months
does not have a supervisor
doesn't include first aid/CPR
how does a manager complete F&BS certification prior to CFM? how can review take place?
need to see checklist again since so much time between it and evaluation
performance checklist too general
performance review silly and pointless
save paper; use standards as the checklist
some questions could be more clearly worded
some skills may never be done, e.g. emergency skills
supervisor not very involved
supervisor took too long

OTHER COMMENTS

$150 too steep, especially when still trying to promote certification
designed for large establishments; needs be some areas for smaller operations
duties of employees should be outlined more clearly
should create standards for delivery of educational programs and special considerations when working with children
standards committee may skew your survey results
works with supervisor daily but certification process dragged on too long

ATTACHMENT C-5
FOCUS GROUPS

Focus groups were held with 13 certified Food & Beverage Servers and Local Tour Guides.

PERFORMANCE CHECKLIST

Supervisors:
do not have time
should be certified before rest of staff
motivation can be a problem
hard if supervisor is not pro-certification
should work with supervisor on site-specific skills
everything done on own with out supervisor
family support
not necessarily aware of job as whole
good to let supervisor know what's going on
send letters to tell supervisor to work with candidate
supervisor & company should be made more aware of process
supervisor involvement is great
should focus on management to educate them
supervisor gave mock test and helped study
not as motivated without supervisor
have peer if not supervisor
reg form should include "should we inform your supervisor?"
ATEC should have more communication with supervisor

Format:
comments/questions for each standard to make sure person is aware/learning
workbook style which can work with supervisor or not
use T/F or fill in the blanks
needs more substance

ATEC support:
should phone to keep people going; better than letter
should put more pressure on people to finish
be more strict
should have established time line
shouldn't take longer than 6 months (year is too long)
people who want it will do it
need checklist with time limit,
e.g. pay more money if not in

In-house Training:
good basis to start and continue on
work experience great for training
same basic training, adapt to site
should be good to begin with (e.g. people skills)
useful as training and evaluation tool

Training/workshops:
time constraints to let guides go to workshops
would need time off work
cost

Letters of reference:
needed as incentive for LTG to make checklist more important

INDUSTRY EVALUATION

Evaluators:
training should be more specific
should be experienced
evaluator should have same sheet as one sent to candidates re: what is going to be evaluated
should be certified in occupation
shouldn't get involved, e.g. correct guide
should match evaluator to situation
shouldn't know guide (travel)

Timing of evaluation:
time of year, time of day
time consuming for evaluator
took too much time for evaluation to happen
should be during busy season

Anonymous vs. contrived:
should be anonymous
uncomfortable/nerve wracking when contrived
shouldn't know when evaluator is coming
should be in natural setting
should be everyday style; not contrived
FBS easier to serve strangers
LTG should be part of a group
need to observe individual (LTG) dealing with people they don't know for repoire (interpersonal skills)
shouldn't be conducted in car
one on one should be avoided
supervisor should know to arrange schedule
more natural when don't know; nervous when know
got flustered when found out
should wait to let candidate know
evaluator should contact supervisor not candidate

Preparedness for evaluation:
felt prepared after completing PC
much easier to prepare when working everyday
experience helped ease nervousness

Results:
criticized for some things even though house policy
would be nice to see evaluator's comments checklist and where went wrong on exam
comments should be detailed
should indicate items related to standards
written results should include note about interview
talked about evaluation after and bounced ideas off each other

House policy:
comments should note special circumstances
evaluator should meet with supervisor first to establish policies

Interview:
should identify some strengths and weaknesses
alleviated concerns about evaluation
should clarify house policy
evaluator should give feedback to candidate at interview to alleviate concern of waiting for results; candidate can correct immediately on small things
impressed with way evaluator sat down and did interview

Necessity of step:
definitely
must have outside evaluator

Long haul:
difficult to evaluate as per LTG standards
hard for distance guide as bus tour (contrived)
long distance involves more; big hole
need to get Tour Manager/Director finished
evaluator should be experienced as Long Distance guide

PERCEPTIONS & REFLECTIONS

Recognition by others:
people ask for pins
incentives, management behind it, long term staff going through
recognized by peers
LTG balking at having to pay more wages
recognized by public
prefer to hire certified LTG as less training is needed
envious peers
increase in tips for FBS
opportunity for promotion/advancement
wage increase
ATEC newsletter circulated at work
name in newspaper
nothing yet on-site
not important to industry yet
reimbursed when certified (for some)
no pay raise for some

Self/internal:
self-esteem
more aware of things
looks good on resume
more confident
pride in job
adaptable/transferable skills
challenging
learn something new even if experienced

Credibility of occupation:
legitimizes occupation
qualification of job
respectability
not perceived as low-end job anymore
professionalism
boost to profession
now it's a "real" job
guideline of what's right and wrong
about time someone did this
long time coming

Supervisor perspective:
makes training easier

Process:
should be smoother flowing
need to keep up momentum
less gap
too long of time in process

Other comments:
won't help poor servers
definitely consider certification even if not in field test
definitely recommend certification to others
commitment to industry
ATEC needs higher profile -- leery -- who is ATEC?
LTG cert criteria: never take out
keep in layman terms

ATTACHMENT C-6
FOLLOW-UP TELEPHONE INTERVIEWS WITH CERTIFIED CANDIDATES

37 certified candidates were telephoned in September and asked for their comments about the industry evaluation, the performance checklist/review and their overall perceptions of the certification process.

Industry Evaluation

#1: Did you feel prepared for the industry evaluation?
Yes: 32
No: 2
N/A: 3

#2: Do you think the evaluation was a true reflection of your day-to-day performance?
Yes: 32
No: 2
N/A: 3

#3 & #4: Did you know who the evaluator was, and would you prefer to know the identity of the evaluator?
3 candidates would have preferred to have known
4 knew at the time, but would have preferred not to have known
1 knew, and liked it that way
12 did not know, and liked it that way
17 were indifferent, or N/A

Comments:
If the evaluation was a success, the candidates did not care whether or not they knew who the evaluator was.
Supervisors said that it would not make a difference because they had to know.
Because of the nature of the work, it is necessary that the local tour guides know who the evaluator is.
One FBS candidate expressed the need for a warning as to the day when the evaluation will take place, as unavoidable things like a bus load arriving or someone calling in sick can affect performance.
Many candidates preferred not to know of the evaluator, because it would make them more nervous, or cause them to act unnaturally.

#4: How did you feel about the evaluator? (professionalism, competence, objectivity)
32 candidates stated that the evaluator was good-excellent on all three counts
1 candidate was concerned that the evaluator was unfair, because he came from a fine dining background, and the establishment was pub-style
4 candidates felt that the evaluator was acceptable

Comments:
The short interview after the evaluation helped the candidate get extra feedback, which was valued.
Evaluator's interest in the establishment and any establishment-specific questions asked were valued.
Knowing the evaluator personally was felt to be a disadvantage.

#5: Was an interview conducted after your evaluation, and what were your perceptions of this interview?
A post interview seemed to be a valid component of the process. All of the candidates who had a short interview expressed that it went quite well, and some were quite enthusiastic about the feedback they received. The only concern with the post-interview is that it called for flexibility. If the candidate seemed too busy, or if the evaluator had a plane to catch, the candidates thought it would be better to omit the interview.
Some supervisors were evaluated interview-style rather than on the job, because of their position/situation (one lady was on maternity leave). They felt this worked well because role-playing was used to go through the components of the industry evaluation.

#6: Do you think the evaluation is necessary for certification?

Yes: 35
No: 2

Comments:

Only 2 candidates interviewed had reservations. One commented that the industry evaluation is too subjective. The other was concerned that unavoidable crisis are to the server's disadvantage, and are not always recognized and accommodated by the evaluator.

Several candidates had problems scheduling their evaluations and found this and the resulting overall length of the process to be quite frustrating.

Performance Checklist/Review

#7: How did you complete the performance checklist?

Feedback on this varied. Some completed it with their supervisor, some by themselves. Most found it worked best to complete it at work.

#8: Should this step be more structured?

More flexible: 21
OK as is: 14
More structure: 2

Comments:

Those candidates who felt that, if anything, the process should be more flexible, expressed the following reasons:

1. If a FBS or Tour Guide has been in the industry for a long time (2 years or more), they may not need a supervisor to be involved at all.
2. In the tour guide situation, the tour guides are entities unto themselves on the job, so they should be able to complete the process on their own.
3. Whether or not a candidate requires help from the supervisor should be determined by the supervisor after examining the employees motivation, experience, and skill level.

#9: Is the performance checklist useful as a training tool, an evaluation tool, or both?

Repetitive: 4
Too basic: 4
Useful for training, evaluation or both: 27

Comments:

Those who were concerned with repetition and who did not find it useful because it was too basic were experienced industry members. A few of these were also employed at fine, high-end dining establishments.

Those who found it useful, particularly those from the coffee shop/pub atmosphere commented that it made them think about things more, or see things through the eyes of the customer, and that it was a useful tool for self-evaluation.

#10: What challenges did you have with "house policies" being different from the standards?

Two candidates expressed that the standards were catered to fine dining and thus many of the technical aspects like the wine-opening were not applicable in their work.

One candidate, who is employed in a banquet atmosphere, said that in his situation they treat guests even more specially than the standards outlined.

The remainder of the candidates mentioned only slight problems or no problems at all with house policies conflicting with the standards. Those who had minimal problems said that these were small components, like bill presentation and place setting. They had to take time to recall exactly what the discrepancies were. All were accommodated in such a way as to not effect the LTG's or FBS's evaluation.

Role of Supervisors in the Certification Process

#11: Did your supervisor assist you in completing the certification process?

Yes: 19
Very little: 4
No: 13
N/A: 5

Comments:

This question did not apply to supervisors and owners.
One candidate expressed a concern that her supervisor did not spend as much time with her as she had anticipated.
Many of those who answered 'no' felt they did not need help from a supervisor to complete the process.
Those who did work with their supervisors somewhat in completing the certification process expressed that this gave them a good feeling; their supervisors were there to answer questions; they benefited from their supervisors technical knowledge.
None of the candidates experienced any problems resulting from supervisorial involvement.
Improved relations between supervisor and candidate was also cited as a benefit.
Many of those who worked independently felt that this worked well for them.
One conclusion that can be drawn from this data is that this component of the process should be flexible.

#14: What level of involvement do you think supervisors should have in the certification process?

Management buy-in essential: 10
Supervisor should be certified: 4
Varies with situation: 23

Comments:

Reasons given in support of management buy-in were that it is essential to obtain greater numbers as far as employees' involvement in the certification process.
The majority expressed that it would be ideal if the supervisors were certified, but that that is not realistic.
Candidates should be able to complete the process on their own if they have the desire to do so.
Supervisors should be available to answer questions, but not necessarily become more involved than that.
It would be good if the supervisors could assess the situation - considering the empioyees' experience, skill level, and motivation - and decide how much they need to be involved.

#15: What should supervisors be asked to complete (signatory page, every skill etc.)?

Many candidates did not understand this question. They gave tentative responses.
Only a few thought the supervisor should go through each skill with the candidate. These were FBS candidates.
Most candidates thought the signatory page would be the best alternative, but many expressed that "that depends".

Perceptions of becoming certified

#16: What changes have you perceived since becoming certified?

Five candidates expressed that they have perceived no changes since becoming certified.
Twenty said the changes perceived were higher morale at work and greater self-esteem.
Nine received recognition from the management at their place of employment.
Three felt that the addition to their resume was the largest bonus.
None of the candidates received wage increments.

#17: What form of recognition is most important to you?

The LTGs felt the pin was the most important to them; others said a wage increase would be most important.

Overall satisfaction with the certification process

#18: Would you have considered certification if you had not been involved in the test group?

Yes: 24
No: 12

Comments:

Out of those candidates who answered 'yes,' 10 expressed the need for a sales pitch. In order to convince them of the merits of certification, they would have had to have been "sold" on certification by either management buy-in or sales calls.

Those candidates who answered 'no' gave as their reasons years of experience, other courses taken, finishing their career in the industry, and a "why bother" attitude.

#19: Would you recommend certification to others?

Yes: 35
No: 2

Comments:

Reasons given for not recommending certification to others were the lack of tangible rewards and that certification is just a start or a complement to training; it is not a be all end all.

Many of those who said 'yes' have already recommended the process both at their workplace and outside their workplace.

ATTACHMENT D
RESULTS OF INVIGILATOR INTERVIEWS

The following tables present the responses by the invigilators during the telephone interviews. The frequencies are segmented according to province. Because some invigilators supervised exams for both occupations, the responses have not been separated for Food & Beverage Server and Local Tour Guide. The staff at the provincial TSC offices invigilated the majority of the exams. A total of 32 outside invigilators were telephoned. The response rate (50%) was lower than expected because some of the exams had been invigilated by summer students who no longer worked at the exam sites and because many of the invigilators did not return the numerous messages left for them.

I2. How well did the information you received from the provincial TSC office prepare you to invigilate the examination?

	AB	BC	MB	SK	TOTAL
Well	7	2	2	2	13
Very poorly	1	0	0	0	1
Undecided	1	0	0	1	2
Total number of respondents	9	2	2	3	16
Total number of invigilators	10	5	7	10	32

Comments:

missing one FBS exam (2)
exams were missing half the pages (7)
computer answer sheet was confusing
if people have to go to the washroom, can they leave the room?
information better than for most other exams
information clearly explained all the details

I3. If you had any questions in advance, did the provincial TSC office answer these questions promptly?

	AB	BC	MB	SK	TOTAL
Yes	8	0	2	2	12
No	0	0	0	0	0
TOTAL	8	0	2	2	12

I4. Were all arrangements made well enough in advance?

	AB	BC	MB	SK	TOTAL
Yes	8	2	2	3	15
No	0	0	0	0	0
TOTAL	8	2	2	3	15

I5. How adequate were the facilities for the candidates writing the examination?

	AB	BC	MB	SK	TOTAL
Very adequate	4	2	1	2	9
Adequate	4	0	1	1	6
TOTAL	8	2	2	3	15

I6. Did you review the instructions with the candidates prior to writing the exam?

	AB	BC	MB	SK	TOTAL
Yes	6	2	2	3	13
No	2	0	0	0	2
Total	8	2	2	3	15

Comments:
should receive copy of what candidate receives
there were no instructions on how to complete the answer sheet

I7. Do you think the candidates had clear instructions for writing the exam?

	AB	BC	MB	SK	TOTAL
Yes	7	2	2	3	14
No	1	0	0	0	1
Total	8	2	2	3	15

Comments:
there were no instructions on how to complete the answer sheet

I8.a. Were you asked any questions by the candidates?

	AB	BC	MB	SK	TOTAL
Yes	6	0	0	1	7
No	2	2	2	2	8
Total	8	2	2	3	15

Comments:
clarification of questions
length of exam
when results would be out
how to fill in the answer sheet (2)
"where are the missing pages?"

I8.b. Could you readily answer these questions?

RESPONSE	TOTAL
Yes	4
No	2
Total	6

Comments:

poorly worded questions on exam
needed copy of instructions that was given to candidates

I9. Would you be willing to invigilate another certification examination for TSC?

	AB	BC	MB	SK	TOTAL
Yes	8	2	2	3	15
No	0	0	0	0	0
Total	8	2	2	3	15

10. Any other comments or suggestions about the examination?

should send out results sooner
one candidate didn't show up to write exam
candidates need support and empathy -- process should be more people-oriented and the exam less scary (3)
candidates usually finish with time to spare
school usually charge $10 fee for invigilating exams

ATTACHMENT E
RESULTS OF SUPERVISOR TELEPHONE INTERVIEWS

Supervisors of at least one certified candidate were contacted to get feedback on all steps of the process. Attempts were made to contact 30 supervisors, but only 18 interviews were completed. Some supervisors who had been listed were not actively involved in the certification process and declined to participate in the telephone interview. Others no longer worked at the establishment or could not be contacted. Some of the supervisors interviewed did not answer all the questions.

S2.a. How well has the information you have received from the provincial TSC office explained your role in the certification process?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Very well	1			1	2		2
Well	2	1	2		3	2	5
Undecided/No information	2	5	2	1	5	5	10
Total	5	6	4	2	10	7	17

S2.b. How could the information be improved?
hasn't received any specific information yet (4)
needed more specific guidance (4)
explain process (2)
IVC (2)
letter is NOT needed, mostly common sense
follow up with supervisor and server

S3.a. Did you ever need to contact the provincial TSC office directly to clarify an issue or concern?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Yes	2	1	3	1	4	3	7
No	3	4		1	4	4	8
Total	5	5	3	2	8	7	15

3.b. If yes, how well did the TSC office respond to your questions?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Very well	2			1	2	1	3
Well		1	3		2	2	4
Total	2	1	3	1	4	3	7

S3.c. Comments.
needed clarification on:
- written exam (2)
- prerequisites (2)
- certification presentations

needed to arrange dates for evaluations

S5.a. Should supervisors be given the opportunity to purchase their own copy of the standards?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Yes	5	5	3	2	8	7	15
Total	5	5	3	2	8	7	15

S5.b. Reasons.
beneficial as a reference for training (4)
improves level of professionalism and consistency (4)
important for supervisor to know what candidate reads (3)
supervisors should be better educated and motivated (2)
to establish basic guidelines for training (2)
good to start new organization
offer at reduced rate
reaffirms what you should already know

S6. What assistance are you providing to each employee working through the performance checklist/review?
one-on-one discussion (5)
discussed in meetings (2)
identified strengths and weaknesses (2)
observation (2)
application of skills to site
encouragement
hands on
helped polish performance
information when required by candidates
ongoing evaluation
quizzed on areas not done at work
seminars
step by step through performance review

none (4)

S7. How many hours would you estimate that you and each employee worked together while completing the performance checklist?
??? (3)
up to 2 hours (5)
8-10 hours (3)
60-80 hours
months

S8. Was this the amount of time you expected?

	AB	BC	MB	SK	FBS	LTG	TOTAL
About what was expected	3	1	3	1	4	4	8
Less than expected	1		1	1	3		3
More than expected							0
Total	4	1	4	2	7	4	11

S8.b. Comments.
expected it would take longer to get servers up to speed
may take more time to help inexperienced staff
more time to motivate
need to take certification seriously and invest time in it
supervisor should be able to take the time
wished to spend more time with candidates

S9.a. How did you use the performance checklist/review?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Training tool	1				1		1
Evaluation tool	3			1	2	2	4
Both	1		5	1	5	2	7
Total	5	0	5	2	8	4	12

S9.b. Comments.

Training:
improved skills (3)
incorporated standards into training program (2)
not using for training at present but will in future (2)
classroom
difficult to schedule
examples & scenarios
had servers working together
identified strengths and weaknesses
mock set-up
practised skills
reviewed in small groups
reviewed periodically
simple and quick but thorough training method
went through section by section

Evaluation:
observation to identify strengths and weaknesses (4)
discussion
identified training needs
in addition to own internal evaluation
incorporated standards into key responsibilities
ongoing
reviewed performance

S10.a. Which of the following alternatives would you prefer to complete for each candidate?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Signatory page only	1	1	1	1	3	1	4
Each skill			2		1	1	2
Summary with major categories	4		1	1	3	3	6
Total	5	1	4	2	7	5	12

S10.b. Comments.

Signatory Page
doesn't take a lot of time (2)
should be enough if supervisor is responsible and instructions are clear
not worth much

Signing each skill
no doubts/ambiguities for MTEC and supervisor
supervisor should take time to go through standard by standard
initialling each skill takes too long (3)
signing off all skills isn't necessary
too easy to sign off just one page

Summary with major categories
doesn't get too specific
easiest and most efficient method
identifies skills which are excellent and skills which need improving
provides an overall assessment

Other comments
prefers to write comments
should be ongoing
should have varying level of performance for each skill
it's not necessary to sign anything

S11. Do you have any other comments or suggestions about the performance checklist?
better for new guides than experienced guides
bulky, extra paper -- is this step necessary?
guides should use to refresh memories for new season
self-explanatory for professionals
should be summary at end of standards
should include section on educational programs
supervisor should focus on site-specific skills
would be very easy for supervisor to just check off skills

S12. What are your perceptions of the industry evaluation?

Positive
really good (3)
required (2)
based on standards
interview is very important
limits "free passes"
straight forward
this is what we've been working for

Negative/Recommendations
timing of evaluations (4):
- not when very busy or short staffed (2)
- should be busy enough to observe all skills in evaluation
- not during stressful situation

too subjective (3)
evaluators should:
- be certified
- be compensated
- be familiar with standards
- be incognito (2)
- never correct guide during tour
- not ask questions during observation
- tour site or meet with supervisor before evaluation (2)

bit staged for management
candidate should work at least one season before evaluation
delay between exam and evaluation and between evaluation and results
delays -- waiting for evaluations
difficult to keep evaluator incognito
evaluators are very busy during tour season
extra pressure on some guides
need commentary in evaluation
should be more than one observation to avoid interview
should discuss weak point during the interview rather than in letter three weeks later
some skills are not as important as others, e.g. saying evaluator's name after returning credit card
some skills are not straight forward

S13. What role do you think supervisors should have in the certification process?

Close involvement:
work with staff closely and be very involved (6)
provide encouragement (3)
maintain standards once certified (2)
assist candidates in upgrading skills
be aware of performance because works with candidate all the time
include standards in property to improve level of service
objective, not biased
prepare guides for written exam through study groups and discussion
provide positive environment for candidates
recognition for certified guides
share perspective
site-specific skills
support certification in property
take review seriously
train based on standards
trainer
update periodically
use as evaluation tool to ensure job is done well
validation that guides are ready for evaluation

Hands off involvement:
employee driven, so employee must take initiative
shouldn't be directly involved (2):
- guides are old enough
- hire certain type of people (2)

shouldn't push just to get "certified" staff

Other comments:
supervisors should be certified (3)
co-ordinate with evaluators
differs between establishments and serving standards
need balance between supervisor and evaluator
opinion of supervisor should carry some weight
should be knowledgeable
some supervisors may not be good at evaluating and training and will need assistance
time available is an issue for many supervisors

S14.a. Will you be encouraging other employees to apply for certification?

	AB	BC	MB	SK	FBS	LTG	TOTAL
Yes	5	5	5	2	10	7	17
No		1			1		1
Total	5	6	5	2	11	7	18

S14.b. Comments.
has more signed up now (2)
would like more information (2)
good idea but whole process needs to be reviewed (duplication of exam, length of time)
will be encouraging long-term employees

S15. What is your overall perception about the certification process?

Positive
Process:
satisfied (6)
will have more impact in industry when more people are certified (2)
glad cost is being split by Workforce 2000
good to have three steps: theory, self-learning, evaluation
thorough
very supportive of entire program

Benefits/Results:
good step towards making LTG a valid occupation
great so far but going slow (takes time and patience)
in few years will only hire certified guides
it's about time
keeps locals in tour guide industry who are professionals
more prestige and professionalism

Negative/Recommendations

Process:
need to review standards before certification is open to everyone (2)
candidates without support of supervisor need to have someone to refer to
GM started it and then handed it over to supervisor without much background information
if candidate memorizes standards to pass exam, will be discouraged with checklist
local knowledge is also essential
prerequisites are holding guides back; should be company policy
should have only one or two exam writings
should set up training program
translation of standards, exam and evaluation
would be taken more seriously if formal training conducted by professional trainer

Challenges:
certification is too expensive (4)
promote more (2)
increase pay for guides will increase costs of tours
needs to be incentive
visible award system by MTEC?

ATTACHMENT F
EVALUATOR INTERVIEWS

Evaluators were very difficult to contact in August. Many were not in or did not return messages. Some others declined to comment because they had only conducted one evaluation. A total of 13 out of 25 evaluators were interviewed. Not all evaluators responded to all the questions.

E2.a. Does the evaluation form require you to evaluate candidates in a consistent manner?

	FBS	LTG	TOTAL
Yes	7	3	10
No	3		3
Total	10	3	13

E2.b. Comments.
accepting payment skill cannot be observed
guidelines are good
need more grey areas -- subjectivity
needs more examples
opening and pouring wine are critical but don't apply to some establishments
should include local knowledge section
should include section on overall impression of server

E3.a. How well did the training you received prepare you do to evaluations?

	FBS	LTG	TOTAL
Very well	5		5
Well	2	2	4
Not very well			0
Very poorly		1	1
Undecided	2		2
Total	9	3	12

E3.a. Comments.
relied more on previous experience as school teacher
need more group work to practice (observation and discussion)
drew more on experience as tour guide and trainer
should be certified
practice evaluation in real situation with group is great (2)
what you know, you know
need to de-brief after practice evaluation
should do review training just before evaluations
experience as supervisor/manager helped
must be very familiar with standards
unofficial training

E4.a. Does the evaluation form allow for subjectivity?

	FBS	LTG	TOTAL
Yes	7	3	10
No	1		1
Total	8	3	11

E4.b. Should the evaluation be more or less subjective?

	FBS	LTG	TOTAL
Okay as it is	5	2	7
Less	3		3
More	1		1
Total	9	2	11

E4.c. Comments.
all evaluators should be objective
there isn't room for evaluator's personal bias to fail guides who would pass by different evaluators
allows for server's personality
should include comments for the server outside the form
good servers could fail if not "refined" and may not re-apply for evaluation (e.g. Carla on Cheers)
should offer re-evaluation in 60 days with areas for improvement explained in interview if borderline
somewhat flexible for house policy
depends on each individual
too much room for evaluators to include personal views

E5.a. Do you think the evaluation accurately reflects the occupation?

	FBS	LTG	TOTAL
Yes	8	2	10
No	2	1	3
Total	10	3	13

E5.b. Do you think the evaluation is a fair test of the candidate's skills?

	FBS	LTG	TOTAL
Yes	7	3	10
No	3		3
Total	10	3	13

E5.c. Comments.
should be a bit stricter
should include local knowledge of area, but this would exclude guides at attractions, e.g. botanical gardens
not fair test without grey areas
better to observe than to ask questions
what if the candidate is having a bad day?
timing of evaluations is critical to be accurate

E6.a. Do you think the evaluation should be incognito?

	FBS	LTG	TOTAL
Yes	10	1	11
No		2	2
Total	10	3	13

E6.b. Comments.
not necessary to be incognito especially when familiar with guides in area
can't flub how to deal with people
nicer situation when evaluator is acknowledged on tour
introduced as guide learning content of tour
should be using skills ALL the time; performance shouldn't change for different guests
may get schmoozed if known
contrived situations for supervisors are difficult
servers are expecting evaluator and can usually pick out
better for candidate if incognito so they don't get nervous
need to emphasize to supervisor to not say anything to candidate
different performance when guiding group rather than one-on-one
get true service if incognito
too staged if not incognito
should be totally quiet; no hints that evaluator is coming that day

E7.a. Did you have any problems carrying out the evaluation?

	FBS	LTG	TOTAL
Yes	6	1	7
No	4	2	6
Total	10	3	13

E7.b. Comments.
person failed and complained to others that evaluator didn't know how to evaluate
awkward when younger than candidate
need name tags to identify candidate
candidate taking break
ESL -- menu items
wine service
house policies
contrived situations with supervisors
server knew who evaluator was
complaint is difficult when there is nothing legitimate to complain about

E8.a. Is there any part of the evaluation that you feel is unnecessary?

	FBS	LTG	TOTAL
Yes	1		1
No	7	3	10
Total	8	3	11

E8.b. Comments.
wine opening/pouring is not always applicable
maybe wine service and the complaint
evaluator must play his/her part

E9.a. Is there any part of the evaluation that you are uncomfortable with?

	FBS	LTG	TOTAL
Yes	5	1	6
No	5	2	7
Total	10	3	13

E9.b. Comments.
failing candidates
having to prompt
interview: asking questions about house policy
one-on-one situations for guides
complaint -- might get someone in trouble if it's not legitimate

E10.a. Did you interview the candidate after the evaluation?

	FBS	LTG	TOTAL
Yes	9	3	12
No	1		1
Total	10	3	13

E10.b. Comments.
should offer candidate couple of suggestions to improve
needed to clarify house policy
critical step
difficult to get candidate away from work when busy
too staged for wine service

E11. Any other comments or suggestions about the industry evaluation?

too many guides are giving out inaccurate information
should be stricter
should offer wine seminars
more professionalism for servers
what about business cards for evaluators?
should have more emphasis on suggestive selling
prompts should be more specific for evaluator
evaluator should write specific comments
should be stricter: tableware should be a critical skill (if fail this skill, fail evaluation)
professional appearance -- what does controlled hair mean?
standard table setting -- often poor house policy
should share ideas between evaluators in other provinces
how can supervisors be better evaluated?
dining in group would be better to observe
should have interview with supervisor re: house policy
new form allows for more flexibility for house policy
LTG evaluation must be completed with group
should include space for overall impression
good idea to go with another person -- it's easier to observe more skills and more natural serving situation
suggestive selling is too easy to pass
tough to write objective comment on "take food order"
candidates expect evaluator and can pick out
supervisor needs to keep quiet about the date for the evaluation
budget for evaluators is different depending on restaurant; didn't know what you could order

ATTACHMENT G
COMMENTS ABOUT THE STANDARDS

Positive

Candidates:
covered basics of knowledge
good to see theoretical from hotel administration in standards
really good content in standards
standards book has become more relevant now that it is used as a reference book
good standards for LTG

Supervisors:
very good (9)
excellent starting point (4)
comprehensive/thorough (2)
can only put so much on paper
effective for servers who are not formally educated
grass roots from industry
indication of guidelines
specific
include standards in property to improve level of service

Negative

Candidates:
some skills in standards don't apply (7)
major categories should be in different colours (2)
mickey mouse standards -- too picky, detailed and obvious (2)
point form is harder to read (2)
booklet set-up confusing with columns, easier if written in paragraphs
some of the wording in the occupational standards book rather awkward
how accurate are the standards?
LTG standards should have more on tour directors
management is being inflexible to incorporate standards
need definitions of job paths
should have more in standards on suggestive selling
some standards are more relevant to fine dining
standards are difficult to read
wording is difficult to understand
very big document
booklet (standards) was confusing
standards are too easy to skim through and not take seriously
standards not detailed enough for exam
some skills in standards differed from house policy
wording confusing; layout of standards difficult to follow

Supervisors:
house policy differs from standards (2)
some areas are confusing because they are so general and not work area specific
very general
will need updating

Evaluators:
need to review standards before certification is open to everyone (2)
translation of standards, exam and evaluation